Record Tracking V. 2.0 User Manual
November 1991
Part II

Record Information Menu

The Record Information Menu is comprised of five reports which provide comprehensive information pertaining to the records of specified patients. This information is valuable to a broad range of Record Tracking users in the retrieval, control and maintenance of patient records.

The following is a list of the reports included in this menu and a brief description of each.

COMBINATION DATA TRACE - Provides a chronological listing of past record locations, clinic appointments and admission activities, as well as a listing of future scheduled clinic appointments for a specified patient.

EXPANDED RECORD INQUIRY - The Expanded Record Inquiry option provides a listing of all records for a specified patient. The information from the short record inquiry is displayed plus the patient's last admission and discharge and the last three clinic appointments.

RECORD INQUIRY - Provides a detailed listing of all records for a specified patient. The information includes the following, as applicable: type of record, volume #, record #, descriptor, current location, current phone, associated borrower, date charged, movement, responsible user, home location, home phone, inactive flag, retirement flag and last access method. This information may be viewed on-line or sent to a printer.

SHORT RECORD INQUIRY - Provides an abbreviated on-line listing of all records for a specified patient. For each record, the following is listed: record type, volume #, current borrower, date charged, phone/room # of current borrower. If the record has been inactivated or transferred to another facility, this will also be shown. This listing is also provided throughout the Record Tracking package whenever a patient name is entered for record transaction.

TRACE MOVEMENT HISTORY - Provides a chronological listing of record movements for a specified patient; i.e. check-in, charge-out, transfer, etc. The following information is listed: date charged, record/volume, borrower, type of movement, # of days with current borrower.

Record Information Menu
Combination Data Trace

This option generates a chronological listing of past record locations, clinic appointments and admission activities as well as a listing of future clinic appointments for a specified patient. It is used to view a patient's record activity.

The first section of the report contains a chronological listing of all future clinic appointments. All past activities are then listed chronologically by date/time (most recent first) back to whatever date you specify. You may track back as far as 999 days. If you specify a Trace Cut-Off Date which is prior to the date Record Tracking was initialized at your site, the report will include scheduling and admission activities prior to the initialization date but no record activities.

The second section allows a view of the patient's record activity back to the specified date. The date/time, record location, clinic/ward and action may be displayed for each entry.

Record movements may be purged at a site's discretion. Such purging is done according to record type. Generally, your Site Manager or Application Coordinator will perform these purges. Movements which have been purged will not be reflected on this report.

You will be prompted for the patient's name, cut-off date and a device.

Example

```
Select PATIENT: STACK,NORMAN          04-14-45        324938402
Trace Cut-Off Date: T-100/ /JUN 1, 1987     (JUN 1, 1987)
DEVICE: HOME// <RET>      RIGHT MARGIN:80// <RET>
```

Record Information Menu
Combination Data Trace

```
       ADT,Scheduling and Tracking Data Trace Report (MEDICAL ADMINISTRATION)
================================================================================ ======
Name      : STACK,NORMAN      (324-93-8402)                      Page: 1
Birth Date: APR 14, 1945      Ward: 8C            Run Date: FEB 17, 1988  14:05
================================================================================
[Report compiled with data on activities back to JUN  1, 1987]
Date/Time          Record Location             Clinic Name        Ward;Action
--------------------------------------------------------------------------------
APR 15, 1988  09:00                             CARDIOLOGY
MAR  7, 1988  08:30                             MEDICAL
FEB 25, 1988  14:15                             ORTHOPEDIC
=============================================== ================================
                    ABOVE THIS LINE ARE 'FUTURE' ACTIVITIES
================================================================================
FEB 15, 1988  15:48 MEDICAL INFORMATION    ;MR2
FEB 15, 1988  09:00                             ORTHOPEDIC CL
FEB 15, 1988  08:40 ORTHOPEDIC CL          ;MR2
FEB 12, 1988  15:29 MEDICAL INFORMATION    ;MR2
FEB 12, 1988  09:17                                                7A;dis
FEB  4, 1988  14:15 7A                     ;MR2
FEB  4, 1988  14:09                                                7A;tfr
JAN 31, 1988  11:29 MAS FILE ROOM          ;ADM1
JAN 31, 1988  11:29 8B                     ;MR2
JAN 31, 1988  11:27                                                8B;adm
JAN 31, 1988  09:41 ADMITTING              ;ADM1
JAN 31, 1988  09:41 ADMITTING              ;MR2
JAN 16, 1988  11:27 MAS FILE ROOM          ;MR2
JAN 16, 1988  11:27 MAS FILE ROOM          ;ADM1
JAN 15, 1988  10:52 ADMITTING              ;ADM 1
JAN 15, 1988  10:37 ADMITTING              ;MR2
JAN 15, 1988  09:00                             ORTHOPEDIC CL
JAN 15, 1988  08:17 ORTHOPEDIC CL          ;MR2
DEC 20, 1987  09:53 MAS FILE ROOM          ;ADM
DEC 17, 1987  15:16 MAS FILE ROOM           ;MR2
DEC 17, 1987  10:29 CAST ROOM              ;MR2
DEC 17, 1987  09:17 ADMITTING              ;MR2
DEC 17, 1987  08:01 RADIOLOGY              ;MR2
DEC 17, 1987  07:40 ELIGIBILITY            ;ADM1
DEC 17, 1987  07:40 ADMITTING              ;MR2
```

Record Information Menu
Combination Data Trace

```
        ADT,Scheduling and Tracking Data Trace Report (MEDICAL ADMINISTRATION)
==============================================================================
Name      : STACK,NORMAN      (324-93-8402)                      Page: 2
Birth Date: APR 14, 1945      Ward: 8C     Run Date: FEB 17, 1988  14:06
==============================================================================
[Report compiled with data on activities back to JUN  1, 1987]
Date/Time              Record Location          Clinic Name      Ward;Action
------------------------------------------------------------------------------
DEC  3, 1987  15:01 MAS FILE ROOM          ;MR2
DEC  3, 1987  12:29 CARDIOLOGY CL          ;MR2
DEC  3, 1987  11:41 EKG UNIT               ;MR2
DEC  3, 1987  11:00                                CARDIOLOGY CL
DEC  3, 1987  10:12 CARDIOLOGY CL          ;MR2
OCT 22, 1987  12:27 MAS FILE ROOM          ;MR2
OCT 22, 1987  09:00                                MEDICAL CL
OCT 22, 1987  08:27 MEDICAL CL             ;MR2
OCT  9, 1987  11:36 MAS FILE ROOM          ;ADM1
OCT  9, 1987  11:36 MAS FILE ROOM          ;MR1
OCT  9, 1987  11:36 MAS FILE ROOM          ;MR2
SEP  3, 1987  14:29 NEW YORK VAMC          ;ADM1
SEP  3, 1987  14:29 NEW YORK VAMC          ;MR1
SEP  3, 1987  14:29 NEW YORK VAMC          ;MR2
JUL 31, 1987  16:24 MAS FILE ROOM          ;MR2
JUL 31, 1987  13:00                                ORTHOPEDIC CL
JUL 31, 1987  11:49 ORTHOPEDIC CL          ;MR2
JUN 19, 1987  16:00 MAS FILE ROOM          ;ADM1
JUN 19, 1987  16:00 MAS FILE ROOM          ;MR2
JUN 16, 1987  08:17 CORRESPONDENCE UNIT    ;MR2
JUN 12, 1987  10:27 J.D. SMITH, M.D.       ;MR2
JUN  7, 1987  11:38 CORRESPONDENCE UNIT    ;MR2
JUN  7, 1987  11:38 CORRESPONDENCE UNIT    ;ADM1
JUN  3, 1987  12:01 MAS FILE ROOM          ;MR2
JUN  3, 1987  08:30                                MEDICAL CL
JUN  3, 1987  07:40 MEDICAL CL             ;MR2
```

Record Information Menu
Expanded Record Inquiry

The Expanded Record Inquiry option provides a listing of all records for a specified patient. The information from the short record inquiry is displayed plus the patient's last admission and discharge and the last three clinic appointments. This information is valuable to a wide range of users involved in the daily activities of record maintenance and retrieval.

For each of the patient's records the following will be listed (if applicable): type of record, volume no., record no., descriptor, current location, current phone, associated borrower, date assigned to current location, movement and responsible user. For further explanation of each item included in this report, see the list of data definitions provided at the end of the Record Inquiry option documentation.

You will be prompted for patient name and a device.

Example

```
                  CONSOLIDATED HEALTH RECORD Inquiry
===============================================================================
Name      : SELLECK,JOHN  (132-42-7340)                 Page: 1
Birth Date: JAN 19, 1945                    Run Date: JUN 14, 1991@14:00
===============================================================================
Type of Record  :   MEDICAL RECORD      ADMINISTRATIVE FOLD   TRANSFERRED RECORD
Volume No.      :   1                   1                     1
Record No.      :   324                 325                   13163
Descriptor      :                                             med recs vols 1&2
Current Location:   CARDIOLOGY          CENTRAL FILE ROOM     CENTRAL FILE ROO M
Current Phone   :   888/610D            283-7283/133           283-7283/133
Associated Borr.:
Since...        :   05-05-91 @ 12:40    02-04-88 @ 14:32      06-06-91 @ 13:46
Movement        :   CHARGE-OUT          CHECK-IN              CHARGE-OUT
Responsible User:   WODNICK,MARIANNE    BABCOCK,LISA          BAILEY,CORINNE
                -----------------------------------------------------------------
Clinic appoint  :   MEDICINE            SEP 28, 1990@09:00
Clinic appoint  :   MEDICINE            SEP 21, 1990@09:00
Clinic appoint  :   MEDICINE            SEP 14, 1990@09:00
```

Record Information Menu
Record Inquiry

This option provides a detailed report of demographic and request information
pertaining to the records of a specified patient. This information is valuable to a
wide range of users involved in the daily activities of record maintenance and
retrieval.

The report is run for a specified patient and may include all of their records, all
volumes of a specified record type or just one volume. It may be viewed on the
screen or printed out.

For each of the patient's records the following will be listed (if applicable): type of
record, volume no., record no., descriptor, current location, current phone,
associated borrower, date assigned to current location, movement, responsible user,
home location, home phone, inactive flag, retirement flag and last access method. A
list of data definitions is provided at the end of this option documentation providing
further explanation of each item included in this report.

The Record Request Profile is also provided which lists requests by status (pending,
filled, cancelled or never filled) indicating the record, requestor, date needed, phone
#, requesting user and request number.

Example

```
Select PATIENT:   PEARSON,THEODORE                 09-16-08        234567890

Indicate what information to display: All//  <RET>
DEVICE: HOME//  <RET>      RIGHT MARGIN: 80//  <RET>


                    CONSOLIDATED HEALTH RECORD Inquiry
====================================================== ==========================
Name      : PEARSON,THEODORE   (234-56-7890)         Page: 1
Birth Date: Sep 16, 1908                     Run Date: FEB  8, 1988  13:02
====================================================== ==========================
Type of Record  :  MEDICAL RECORD       ADMINISTRATIVE FOLD
Volume No.      :  1                     1
Record No.      :  298                   299
Descriptor      :
Current Location:  MEDICAL CLINIC        MAS FILE ROOM
Current Phone   :  2945/6A               4307/Room 254
Associated Borr.:
Since...        :  02-08-88 @ 07:45      05-11-87 @ 15:01
Movement        :  CHARGE-OUT            CHECK-IN
Responsible User:  WANDA REYNOLDS        DAVID DOUGLAS
Home Location   :  MAS FILE ROOM         MAS FILE ROOM
Home Phone      :  4307/Room 254         4307/Room 254
Inactive Flag   :
Retirement Flag :  OK TO RETIRE
Last Access Meth:  Non-barcode           Barcode
```

Record Information Menu
Record Inquiry

   ...will now compile record request data

Press RETURN to continue or '^' to stop: <u>\<RET></u>

                     CONSOLIDATED HEALTH RECORD Inquiry
==
Name   : PEARSON,THEODORE   (234-56-7890)   Page: 2
Birth Date: Sep 16, 1908   Run Date: FEB 8, 1988 13:03
==
                   **** RECORD REQUEST PROFILE ****
Record   Requestor   Date Needed   Phone#   Requesting User Req#
------   ---------   -----------   ------   -------------- ----
[Pending]
MR1   DIABETIC CLINIC   02-17-88 @10:00 4283/7C   BOB MCGEE   724
[Filled]
MR1   MEDICAL CLINIC   02-08-88@08:00 2945/6A   BOB MCGEE   639
MR1   ORTHOPEDIC SURG   12-29-87@08:00 2738/8B   BOB MCGEE   328
[Cancelled or Never Filled]
MR1   JOHN SMITH, M.D. 01-12-88@ll:27 3293/207   JOHN SMITH, M.D.382

Record Information Menu
Record Inquiry

Data Definitions
Following is a list of definitions for each field appearing on the Record Inquiry. The fields are listed in the same order they appear on the report.

FIELD	DEFINITION
TYPE OF RECORD	Medical, administrative, master folder, chest films, etc. Entries in this field will vary depending upon which application you are working with; Medical Administration or Radiology.
VOLUME NO.	This is the volume number of the record.
RECORD NO.	This indicates the internal number assigned to the record by Record Tracking (sometimes referred to as the record identifier number). Each record within the system is assigned a number upon creation. This number is unique to the record and may be entered wherever you see the Select Record prompt.
DESCRIPTOR	A brief description of the record as entered by the user who created it.
CURRENT LOCATION	Current borrower of the record.
CURRENT PHONE	Telephone number/location of the current borrower.
ASSOCIATED BORROWER	The entry in this field will be the name of an associated borrower, if applicable. Depending upon your site's specifications, users may be prompted to enter the name of an associated borrower when charging out or recharging a record. This is generally used when the actual borrower of the record is a location, such as a clinic or ward. The entry should be the name of an actual person. This gives other users a name to contact when inquiring about the record.
SINCE	Date/time the record was charged to the current location.

Record Information Menu
Record Inquiry

FIELD   DEFINITION

MOVEMENT   Last movement of the record; i.e., charge-out,
                               check-in, etc. This movement resulted in the record
                               being charged to the current location.

RESPONSIBLE USER   The user responsible for making the last movement
                               of the record.

HOME LOCATION   Location the record resides when not charged out;
                               generally, the file room.

HOME PHONE   This indicates the telephone number/location on file
                               of the home location.

INACTIVE FLAG   An entry will appear in this field if the record has
                               been inactivated or transferred; otherwise, it will be
                               blank.

RETIREMENT FLAG   Used to indicate whether a record may be retired.
                               It should be checked prior to retiring any record.
                               The following entries may appear:

                                 TEACHING
                                 TUMOR REGISTRY
                                 OK TO RETIRE

                               All records are assumed OK TO RETIRE by the
                               system unless an actual entry has been made
                               through the Update Record's Attributes option. If an
                               entry has never been made, this field will be blank
                               on the Record Inquiry rather than OK TO RETIRE.

LAST ACCESS METH   This indicates the method used (either barcode or
                               non-barcode) the last time the record was accessed.

Record Information Menu
Short Record Inquiry

This option provides an abbreviated on-line listing of all records for a specified
patient. It is the same listing which is displayed throughout the Record Tracking
package when a patient name is keyboard entered rather than a barcode being
wanded.

This option displays several lines of demographic data related to the patient. For
each record (listed by record type), the volume number, current borrower, date/time
charged to that borrower and phone/room of the borrower will be shown. Whenever
a record is inactive (as a result of being transferred to another facility or
inactivated) or charged to a borrower as a result of being on a pull list, it will be so
annotated beneath the record. Associated borrowers may also be shown.

Example

```
Select PATIENT:  R1234  RAYBURN,CORNELIUS  04-13-48   222111234


                     **** MEDICAL ADMINISTRATION Profile ****
===========================================================================
Name     : RAYBURN,CORNELIUS  (222-11-1234)          Page: 1
Birth Date: APR 13, 1948    Ward: 7C MED         Run Date: JAN 15, 1988  10:42
===========================================================================
   Record Type       Vol    Current Borrower   Date Charged        Phone/Room #
   ----------        ---    ----------------   ------------        ------------
   MEDICAL RECORD    V1     WARD 7C            DEC 29, 1987  08:42 3547/7C
                            (DAVID DOUGLAS)                        3547/7C
   ------------------------------------------------------------------------
   ADMINISTRATIVE F  V1     MAS FILE ROOM      APR 12, 1987  10:42 2111/301


Select PATIENT:  RICHARDS,JOHN  02-04-08    234444321


                     **** MEDICAL ADMINISTRATION Profile ****
===========================================================================
Name     : RICHARDS,JOHN  (234-44-4321)              Page: 1
Birth Date: FEB  4, 1908                         Run Date: JAN 15, 1988  10:43
                     ***** Date of Death: MAR  6, 1985 *****
===========================================================================
   Record Type       Vol    Current Borrower   Date Charged        Phone/Room #
   ----------        ---    ----------------   ------------        ------------
   MEDICAL RECORD    V1     MAS FILE ROOM      DEC 29, 1987  08:42 3547/7C
   ------------------------------------------------------------------------
   ADMINISTRATIVE F  V1     REGIONAL OFFICE    APR 12, 1987  10:42 2111/301
      ****INACTIVE****


Select PATIENT: <RET>
```

Record Information Menu
Trace Movement History

The Trace Movement History option provides a chronological listing of record movements (charge-out, check-in, etc.) for a specified patient.

The report lists each record movement in order of date/time of occurrence (most recent first) giving record/volume, borrower and type of movement as well as the date/time. It also includes a "# of days" column which indicates the number of days the borrower had that particular record prior to the next movement.

You may select to sort this listing in date order which will include all records together (mixed) or you may have it broken down separately by record (separate). When broken down by record, the listing will still be in chronological date order; however, each record/volume will be listed separately.

The listing may differ somewhat between sites depending upon purge parameters and movement types set up. You will only see the number of movements your site has specified should be kept in the system..

You will be prompted for a patient, how you want the output sorted (MIXED or SEPARATE), and a device.

Record Information Menu
Trace Movement History

Example

```
Select PATIENT: ANDERSON,MICHAEL      09-16-18      234556677

How do you want the 'MEDICAL ADMINISTRATION' records sorted? Mixed// Separate
DEVICE: HOME// <RET>    RIGHT MARGIN: 80//<RET>


                Movement History for the CONSOLIDATED HEALTH RECORD
================================================ ===============================
Name     : ANDERSON,MICHAEL  (234-55-6677)            Page: 1
Birth Date: SEP 16, 1918      WARD: 8C (MED)      Run Date: FEB 11, 1988  12:07
=================================================================== ============
[SORT: By record type display order, volume and then date charged]

Date Charged      Vol    Borrower            Type of Movement     # of Days
-------------------------------------------------------------------------------

[ MEDICAL RECORD (V1)  ]
JAN 13, 1988  10:27 MR 1    WARD 8C              RE-CHARGE              29
JAN 13, 1988  09:16 MR 1    ADMITTING            CHARGE-OUT              0
DEC 29, 1987  08:12 MR 1    JOHN SMITH, M.D.     FOUND RECORD          1 5
DEC 19, 1987  12:17 MR 1    *** MISSING ***      MISSING RECORD        10
DEC 18, 1987  11:43 MR 1    MAS FILE ROOM        TRANSFER BACK FROM OTHER VAMC1
JUN  5, 1987  10:22 MR 1    VAMC CASTLE POINT    TRANSFER TO OTHER VAMC 196
MAY 12, 1987  09:51 MR 1    MAS FILE ROOM        CHECK-IN               24
MAY 11, 1987  15:01 MR 1    SURG CLINIC          CHARGE-OUT              1
                            (JOHN SMITH, M.D.)
MAY  7, 1987  08:09 MR 1    MAS FILE ROOM        INITIAL CREA TION       4




[ ADMINISTRATIVE FOLDER (V1) ]
JAN 15, 1988  09:17 ADM 1    MAS FILE ROOM        CHECK-IN               27
JAN 13, 1988  10:27 ADM 1    ELIGIBILITY          RE-CHARGE               2
JAN 13, 1988  09:16 ADM 1    ADMITTING             CHARGE-OUT             0
DEC 18, 1987  11:43 ADM 1    MAS FILE ROOM        TRANSFER BACK FROM OTHER VAMC26
JUN  5, 1987  10:22 ADM 1    VAMC CASTLE POINT    TRANSFER TO OTHER VAMC 196
MAY 15, 1987  11:47 ADM 1    MAS FILE ROOM        CHECK-IN               21
MAY 11, 1987  15:01 ADM1     ELIGIBILITY          CHARGE-OUT              4
MAY  7, 1987  08:10 ADM1     MAS FILE ROOM        INITIAL CREATION        4

Select PATIENT: <RET>
```

Management Reports Menu

The Management Reports Menu provides a variety of reports useful in analyzing workload and identifying problems in record control and maintenance activities.

The following is descriptive listing of the reports on this menu.

AD HOC REQUEST RESPONSE STATISTICS - A statistical report of file room response times to individual record requests.

CHARGED RECORDS BY HOME LOCATION - A listing of records assigned to a specified home location (file room).

INPATIENT RECORD LOCATION LIST - A listing of the whereabouts of all records of current inpatients. Includes inactive as well as transferred records.

LOOSE FILING REPORT - A listing of all records for which the loose filing indicator has been set to YES. This indicator is set in the Update Record's Attributes option on the Transaction Menu.

MISSING RECORDS LIST - A list of all records which have either been flagged as MISSING or FOUND PENDING SUPERVISOR APPROVAL.

OVERDUE RECORDS LIST - A listing of all records which are past due (as established by site parameters) in being returned to their home location.

PENDING REQUEST LIST - A listing of outstanding record requests not yet printed. May be run to include all clinic requests.

RECORDS CHARGED TO A BORROWER - A listing of records currently charged to a specified borrower. Includes # of days overdue if applicable.

REQUESTS PENDING FOR A BORROWER - A listing of requests pending (as established by site parameters) for a specified borrower.

RETRIEVAL RATE STATISTICS - Provides a breakdown by request status of record requests associated with pull lists and provides a percentage of the number of requests filled.

Management Reports Menu
Ad hoc Request Response Statistics

The Ad hoc Request Response Statistics option generates a report of file room response times to individual record requests within a specified date range.

The report pertains to those requests not associated with pull lists and with a status of either CHARGED, CANCELLED, or NOT FILLABLE. Pending requests are not included. It measures the number of minutes between the date/time requested and the date/time a final status was entered. It is sorted by date, request status, and by requesting date/time within each status. Each section of the report will contain the following for each applicable request:

   Request Number
   Patient Name
   Record Type/Volume
   Requestor
   Time Requested/Requesting User
   Time of Status/Responsible User
   # Minutes (between date/time requested and date/time status was entered)

At the conclusion of each section, the following statistical data will be computed and displayed as appropriate:

   Total (# of minutes)
   Count (# of requests)
   Mean (Average # of minutes)
   Minimum (# of minutes to respond)
   Maximum (# of minutes to respond)
   Deviation (indicates average fluctuation of responses from the mean - the higher the number, the wider the variation)

It is important to note that dependent upon the size of your database, the amount of requesting activity at your facility and the date range specified, this report may be quite lengthy. You may wish to consider running it during an off-tour.

You will be prompted for a beginning and ending date and a device.

Management Reports Menu
Ad hoc Request Response Statistics

Example

```
**** Requested Date Range Selection ****

   Beginning DATE: FEB 2  (FEB 2, 1988)

   Ending    DATE: FEB 2  (FEB 2, 1988)

DEVICE: QUEUE TO PRINT ON
DEVICE: A100    MANAGEMENT REPORTS PRINTER    MARGIN: 132// <RET>
REQUESTED TIME TO PRINT JOB? NOW// T@1700     (FEB  8, 1988  17:00)
REQUEST QUEUED!
```

```
Request Response Statistics for 02-02-88 to 02-02-88           FEB  8, 1988   PAGE 1
REQUEST #   NAME             TYPE    REQUESTOR      TIME REQUESTED/      TIME OF STATUS   MINUTES
                                                    REQUESTING USER      RESPONSIBLE USER
------------------------------------------------------------------------------------------------

              DATE REQUESTED: FEB  2, 1988

              REQUEST STATUS: CHARGED
30          DIXON,THOMAS     MR3     ADMITTING      FEB  2,1988  08:35   FEB  2,1988  08:40     15
                                                    RICHARDS,ANGELA      BURGET,JOHN
=================================================================================================
31          TOMPSON,ROY      MR1     JOHN SMITH,MD  FEB  2,1988 09 :20    FEB  2,1988  09:29      9
                                                    JOHN SMITH,MD        GREEN,PHILIP
=================================================================================================
33          MARTIN,THURMAN   ADM1    CORRESPONDENCE FEB  2,1988 10:36     FEB  2,1988  11:12     36
                                                    REYNOLDS,WANDA       GREEN,PHILIP
=================================================================================================
35          ANDERSON,STEVEN  MR2     ADMITTING      FEB  2,1988 12:16    FEB  2,1988  12:27     11
                                                    RICHARDS,ANGELA      BURGET,JOHN
=================================================================================================
36          GEORGE,RICHARD   MR8     ADMITTING      FEB  2,1988 13:47    FEB  2,1988  14:01     14
                                                    RICHARDS,ANGELA      GLENN,MICHAEL
================================================================================ =================
39          BARKER,HOWARD    ADM1    PATIENT FUNDS  FEB  2,1988 14:27    FEB  2,1988  14:38     11
                                                    STEVENSON,ROGER      BURGET,JOHN
=================================================================================================
40          SHELDON,HOWARD   MR1     ADMITTING      FEB  2,1988 15:01    FEB  2,1988  15:12     11
                                                    RICHARDS,ANGELA      GLENN, MICHAEL
=================================================================================================
41          STEELE,EVELYN    MR2     ADMITTING      FEB  2,1988 15:04    FEB  2,1988  15:12      8
                                                     RICHARDS,ANGELA      GLENN,MICHAEL
=================================================================================================
                                                                                         ---------
SUBTOTAL                                                                                      115
SUBCOUNT                                                                                        8
SUBMEAN                                                                                        14
SUBMINIMUM                                                                                      8
SUBMAXIMUM                                                                                     36
SUBDEV.                                                                                         9
```

Management Reports Menu
Ad hoc Request Response Statistics

```
Request Response Statistics for 02-02-88 to 02-02-88              FEB  8, 1988   PAGE 2
REQUEST #   NAME               TYPE    REQUESTOR      TIME REQUESTED/      TIME OF STATUS   MINUTES
                                                      REQUESTING USER      RESPONSIBLE USER
-----------------------------------------------------------------------------------------------

                   DATE REQUESTED: FEB  2, 1988

                   REQUEST STATUS: NOT FILLABLE
32          EBERLY,SULLIVAN    MR3     MEDICAL OFFICE FEB  2,1988  09:35   FEB  2,1988  09:40    14
                                                      MARVIN,CAROL         BURGET,JOHN
===============================================================================================
37          FILER,HENRY        ADM1    JOHN SMITH,MD  FEB  2,1988 09:20    FEB  2,1988  09:29    18
                                                      REYNOLDS,WANDA       GREEN,PHILIP
===============================================================================================

                                                                           ---------
SUBTOTAL                                                                           32
SUBCOUNT                                                                            2
SUBMEAN                                                                            16
SUBMINIMUM                                                                         14
SUBMAXIMUM                                                                         18
SUBDEV.                                                                             2



Request Response Statistics for 02-02-88 to 02-02-88              FEB  8, 1988   PAGE 3
REQUEST #   NAME               TYPE    REQUESTOR      TIME REQUESTED/      TIME OF STATU S   MINUTES
                                                      REQUESTING USER      RESPONSIBLE USER
-----------------------------------------------------------------------------------------------

                   DATE REQUESTED: FEB  2, 1988

                   REQUEST STATUS: CANCELLED
34          STACK,NORMAN    MR1     ADMITTING FEB  2,1988  11:24   FEB  2,1988  12:04    40
                                                      MARVIN,CAROL         BURGET,JOHN
=============================================== ===============================================
                                                                           ---------
SUBTOTAL                                                                           40
SUBCOUNT                                                                            1
SUBMEAN                                                                            20

                                                                           ---------
SUBTOTAL                                                                          187
SUBCOUNT                                                                           11
SUBMEAN                                                                            17
SUBMINIMUM                                                                          8
SUBMAXIMUM                                                                         40
SUBDEV.                                                                             3
===============================================================================================

TOTAL                                                                            187
COUNT                                                                              11
MEAN                                                                               17
MINIMUM                                                                             8
MAXIMUM                                                                            40
DEV.                                                                                3
===============================================================================================
```

Management Reports Menu
Charged Records by Home Location

The Charged Records by Home Location option provides a listing of records
assigned to a specified home location (file room) and their current borrowers. It
may be run to include ALL records assigned to the home location or just those
currently charged out. It may be sorted by borrower, patient name or terminal
digit.

For each record listed, the following information will be provided.

   Patient Name
   Social Security
   Record Type/Volume No.
   Record No.
   Current Borrower
   Phone/Room of Current Borrower
   Date/Time charged to current borrower
   # of Days Overdue (if applicable)

Dependent upon the size of your database and the home location specified, this
report may be quite lengthy - particularly if you chose to include ALL records
assigned to the home location. You may wish to consider running this report during
off hours.

Example

```
Select HOME Location: MAS FILE ROOM    MAS FILE ROOM
         ...OK? YES// <RET>    (YES)    MEDICAL ADMINISTRATION [ANYTOWN,USA]

How do you want the listing sorted? Borrower// <RET>

Include records currently checked into the home location? No// <RET>
DEVICE: A100    REPORTS PRINTER              RIGHT MARGIN: 132// <RET>

WANT TO FREE UP THIS TERMINAL? NO// Y  (YES)
THIS TERMINAL IS NOW FREE

Exit
```

Management Reports Menu
Charged Records by Home Location

```
Charged Out Records [Home Location: MAS FILE ROOM] [Sorted by: BORROWER] FEB 26, 1988 12:14  PAGE 1
                                                                                          DAYS
NAME                 TYPE   REC #   BORROWER      PHONE/ROOM    SINCE...             OVERDUE
--------------------------------------------------------------------------------------------------

             Borrower: DAVIS,JOHN MD
BLOCK,ROGER    222-33-4444  MR1    311    DAVIS,JOHN MD 3971/244A    FEB  8, 1988 08:53   15
MARTIN,THURM   234-44-4321  MR1    163    DAVIS,JOHN MD 3971/244A    FEB  8, 1988 09:22   15
SMYTH,DAVID    321-12-3456  MR1    139    DAVIS,JOHN MD 3971/244A    FEB  8, 1988 07:48   15
                                          ---------------
SUBCOUNT                                  3

             Borrower: ENT
SCHWARTZ,BILL  272-72-2727  MR1    117    ENT           4624/352D    FEB  9, 1988 11:29   16
TIMMERMAN,AL   321-22-3333  MR1     95    ENT           4624/352D    FEB  9, 1988 11:29   16
                                          ---------------
SUBCOUNT                                  2

             Borrower: General Medicine
ANDERSON,MIKE  234-55-6677  MR1    220    Gen Medicine  8293/1000B   FEB 26, 1988  13:48
GLOSTICK,FRED  021-43-7654  MR1    193    Gen Medicine  8293/1000B   FEB  2, 1988 13:42   21
                                          ---------------
SUBCOUNT                                  2

             Borrower: Medical Info
BRONEGAR,DAN   222-33-4444  ADM2   326    MEDICAL INFO  2837/7A      FEB  8, 1988 14:52   15
GARDNER,JOE    333-44-5555  ADM1   201    MEDICAL INFO  2837/7A      FEB  2, 1988 12:27   12
                                          ---------------
SUBCOUNT                                  2

             Borrower: Plastics
FLINT,JOHN     234-56-7890  MR2    356    PLASTICS      3425/534D    JAN 12, 1988 08:57   44
GRAY,JOSEPH    445-65-6565  MR1    293    PLASTICS      3425/534D    FEB 26, 1988 09:19
HILL,THOMAS    555-67-8969  MR1    325    PLASTICS      3425/534D    JAN 15, 1988 11:26   41
SHELDON,DON    666-33-6666  MR1    309    PLASTICS      3425/534D    FEB 26, 1988 15:25
THOMAS,EDWARD  765-43-2132  MR1    278    PLASTICS      3425/534D    FEB  5, 1988 08:34   20
                                          ---------------
SUBCOUNT                                  5
                                          ---------------
COUNT                                     14
```

Management Reports Menu
Inpatient Record Location List

The Inpatient Record Location List option provides a printout listing the location of all records belonging to current inpatients. All inactive as well as transferred out records are included in the report which may be run for all inpatients or for those with admission dates within a specified date range.

The report lists the following for each patient and record:

Patient Name
Social Security Number
Ward Location
Record #
Record Type
Current Borrower
Phone/Room of Current Borrower
Associated Borrower (if applicable)
Phone/Room of Associated Borrower

Example

```
'ALL' inpatients or 'Range' of admissions? Range// <RET>  range

Beginning Admission Date/Time:  FEB  1@0800    (FEB 1, 1988  08:00)

Ending    Admission Date/Time:  FEB  1@2400     (FEB 1, 1988  24:00)

DEVICE: A100    REPORTS PRINTER            RIGHT MARGIN: 132// <RET>

WANT TO FREE UP THIS TERMINAL? NO// Y  (YES)
THIS TERMINAL IS NOW FREE

Exit
```

Management Reports Menu
Inpatient Record Location List

Record Locations Lists for In-patients Admitted from FEB 1, 1988 08:00 to FEB 1,1988 24:00

FEB 25,1988 09:12 PAGE 1

NAME	SSN	WARD LOCATION	RECORD#	TYPE	CURRENT BORROWER	ASSOCIATED BORROWER
9876 KING,JOSEPH	321-54-9876	6C MED	347	MR1	6C MED 4820/6CD	SMITH,ANNE 4820/6C
			348	ADM1	ELIGIBILITY 2498/110	
1234 RAY,CORNELIUS	222-11-1234	11C PSYCH	366	MR1	11C PSYCH 4807/11C	REYNOLDS,WANDA 4807/11C
			367	ADM1	MAS FILE ROOM 2111/301	
5555 PARKER,TED	000-05-5555	7A NEURO	614	MR1	7A NEURO 4670/7A	DOUGLAS,DAVID 4670/7A
			615	ADM1	MAS FILE ROOM 2111/301	
1235 BAXTER,JOHN	000-00-1235	7A NEURO	231	MR1	7A NEURO 4670/7A	DOUGLAS,DAVID 4670/7A
			232	ADM1	MAS FILE ROOM 2111/301	
0001 FRANK,MARCUS	001-00-0001	9A NHCU	33	MR1	MAS FILE ROOM 2111/301	
			217	MR2	MAS FILE ROOM 2111/301	
			34	ADM1	PATIENT FUNDS 6784/122	BLACK,JILL 6784/122
4444 SULLIVAN,DAN	000-00-4444	5A GEN SURG	493	MR1	5A GEN SURG 5921/5A	JACKSON,BARBARA 5921/ 5A
			494	ADM1	CORRESPONDENCE 3890/210B	JONES,MILDRED 3890/210B

Management Reports Menu
Loose Filing Report

The Loose Filing Report provides a listing of all records in your application for which loose filing exists. Specifically, the records listed will be those for which the Loose Filing Indicator in the Update Record's Attributes option, Transaction Menu, has been set to YES.

The report is sorted in terminal digit order and provides the following information for each record:

Patient Name
Social Security Number
Record Type/Volume
Record Number
Name of Borrower to whom record is presently
 charged
Phone/Room of Borrower
Date/Time Charged
Days Overdue (if applicable)

It should be noted that unless a record's loose filing indicator has been subsequently set to NO after the filing has been accomplished, it will appear on this list.

Management Reports Menu
Loose Filing Report

Example

```
Loose Filing List [Sort:  Terminal Digits]  [MEDICAL ADM INISTRATION]  FEB 24, 1988 10:35  PAGE 1


                                                                       DAYS
NAME                   TYPE  REC#  BORROWER          PHONE/ROOM  SINCE...     OVERDUE
-----------------------------------------------------------------------------------


RAYBURN,CORNELIUS  101-10-1101  MR1   311  DENTAL            3971/244A   FEB  8, 1988  08:53  11
BAILEY,JOHN        456-78-8901  MR1   163  ENT               4624/352D   F EB  9, 1988  11:29  12
NEWHAUS,MILTON     324-93-8402  MR1   139  SURGERY           2093/523C   FEB 17, 1988  07:48   6
RICHARDS,JOSE      123-43-2123  MR1   364  MISSING RECORD                DEC  2, 1987  15:18  82
SCHWARTZ,WILLIAM   272-72-2727  MR1   117  PODIATRY          3297/283A   FEB  9, 1988  11:29  14
TIMMERMAN,ALFRED   321-22-3333  MR1    95  ENT               4624/352D   FEB  9, 1988  11:29  14
GLOSTICK,FRED      021-43-7654  MR1   193  NEUROLOGY         7623 2930B  FEB  2, 1988  13:42  19
ANDERSON,MICHAEL   234-55-6677  MR1   220  GENERAL MEDICINE  8293/1000B  JAN 15, 1988  13:48  37
CONNELLY,ROGER     555-00-0999  ADM1  297  MISSING RECORD                NOV 19, 1987  14:43  96
SCHWARTZ,WILLIAM   272-72-2727  MR1   11   ENT               4624/352D   FEB  9, 1988  11:29  14
TIMMERMAN,ALFRED   321-22-3333  MR1    95  ENT               4624/352D   FEB  9, 1988  11:29  14
                                           ---------------
COUNT                                      11
```

Management Reports Menu
Missing Records List

The Missing Records List option generates a listing of records in your application which are either flagged as missing (via the Flag a Record as Missing option, Transaction Menu) or have been found pending supervisor approval. Please refer to the Flag a Record as Missing option of this manual for a detailed explanation of these two statuses, if needed.

The report is sorted alphabetically by patient name with a section dedicated to each record. For each record, the following information is provided:

Patient Name
Social Security Number
Record Type/Volume
Status - either MISSING or FOUND/SUPE
Borrower History - Section listing all past borrowers (unless purged) with the following information:

- Name of Borrower
- Date/Time Charged
- Whether the record was barcoded when charged to borrower

Date/time record was entered as missing
Person entering it as missing
Supervisor Comments (if any)

If the record has been found pending supervisor approval, the following information will also be provided:

Date/Time entered as found
Who entered it as found
Where it was found
User Comments (if any)

Management Reports Menu
Missing Records List

Example


```
Missing Records List                              FEB 24, 1988   11:04  Page 1
NAME                      TYPE      STATUS    BORROWER HISTORY  CHARGED       BARCODED?
-------------------------------------------------------------------------------------
ANDERSEN,MARCUS  123-45-6789  ADM  1    MISSING   MAS FILE ROOM    MAR 26, 1987  15:13   NO
                                                  PATIENT FUNDS    APR  8, 1987  12:48   NO
                                                  MAS FILE ROOM    APR 13, 1987  09:33   NO
                                                  CORRESPONDENCE   DEC 19, 1987  11:48   NO
                                                  MAS FILE ROOM    DEC 31, 1987  13:14   YES
                                                  MISSING RECORD   JAN  8, 1987  12:24   NO

Entered as Missing : JAN  8, 1988  12:23       Entered By: REYNOLDS, WANDA

Supervisor Comments:    NEEDED FOR RELEASE OF INFORMATION
-------------------------------------------------------------------------------------
[The following fields will only contain information if the record was found by a user who is
'not' a file room supervisor.]

Entered as Found   :                Entered By:                Where it was found:

User Comments      :
=====================================================================================

MARTIN,JOSEPH    321-54-9876  MR   2    FOUND/SUPE  PLASTIC SURG    NOV 18, 1987  10:21   YES
                                                    MAS FILE ROOM   NOV 19, 1987  08:36   YES
                                                    CARDIOLOGY      DEC  1, 1987  12:27   YES
                                                    MAS FILE ROOM   DEC  4, 1987  09:18   YES
                                                    ADMITTING       DEC 12, 1987  10:29   YES
                                                    MAS FILE ROOM   DEC 12, 1987  16:30   YES
                                                    PLASTIC SURG    DEC 29, 1987  08:37   YES
                                                    MAS FILE ROOM   DEC 30, 1987  10:16   YES

Entered as Missing : OCT 29, 1987       Entered By:  DOUGLAS,DAVID

Supervisor Comments:
------------------------------------------------------------------------------- -------------
[The following fields will only contain information if the record was found by a user who is
'not' a file room supervisor.]

Entered as Found   : NOV 10.1987       Entered By:  ROGERS,MARK       Where it was found:
PLASTIC SURG

User Comments      :
=====================================================================================
```

Management Reports Menu
Overdue Records List

The Overdue Records List generates a printout of records in your application which are past due in being returned to their home location. It may be run for an institution (division) or home location. If run by institution, all home locations (file rooms) within the institution will be included on the report. You may further select to have the report sorted by borrower, patient name or terminal digit.

For each overdue record, the following will be listed:

Patient Name
Social Security Number
Record Type/Volume
Record #
Borrower
Phone/Room of Borrower
Date Charged to Borrower
Days Overdue

The system computes and displays the total number of records overdue at the end of the report. If sorted by borrower, it will compute the total for each borrower as well as a grand total.

Determination of whether a record is overdue is based on site parameters and may vary between record types and movement types. These parameters are defined in the following two fields/options found on the System Definition Menu: OVERDUE RECORD CUTOFF field in the Type of Record Set-up option and the INCLUDE ON OVERDUE REPORT field found in the Movement Type Set-up option. Generally, records which have been inactivated, transferred to another site or flagged as missing are not included on the overdue list.

Example

```
Print Overdue List for a 'Institution' or 'Home Location'? Institution//Home
Select HOME Location: MAS FILE ROOM     MAS FILE ROOM
        ...OK? YES// <RET>   (YES)       MEDICAL ADMINISTRATION   [ALBANY, NY]

How do you want the listing sorted? Borrower// <RET>
DEVICE: A100     MANAGEMENT REPORTS PRINTER      MARGIN: 132// <RET>

WANT TO FREE UP THIS TERMINAL? NO// Y   (YES)
THIS TERMINAL IS NOW FREE

Exit
```

Management Reports Menu
Overdue Records List

```
                                                                                  DAYS
NAME                       TYPE  REC #  BORROWER      PHONE/ROOM   SINCE...        OVERDUE
------------------------------------------------------------------------------- ----------------


              Borrower: DENTAL
RAYBURN,CORNELIUS    222-11-1234  MR1   311    DENTAL        3971/244A    FEB 8, 1988   08:53   11
RICHARDS,JOHN        234-44-4321  MR1   163    DENTAL        3971/244A    FEB 8, 1988   09:22   11
SMYTH,DAVIDSON       321-12-3456  MR1   139    DENTAL        3971/244A    FEB 8, 1988   07:48   11
                                               ---------------
SUBCOUNT                                        3

              Borrower: ENT
SCHWARTZ,WILLIAM     272-72-2727  MR1   117    ENT           4624/352D    FEB  9, 1988 11:29   12
TIMMERMAN,ALFRED     321-22-3333  MR1    95    ENT           4624/352D    FEB  9, 1988 11:29   12
                                               ---------------
SUBCOUNT                                        2

              Borrower: General Medicine
ANDERSON,MICHAEL     234-55-6677  MR1   220    General Med 8293/1000B   JAN 15, 1988  13:48   35
GLOSTICK,FRED        021-43-7654  MR1   193    General Med 8293/1000B   FEB  2, 1988  13:42   17
                                             ---------------
SUBCOUNT                                      2

              Borrower: Medical Info
BEANE,STEVEN         222-33-4444  ADM2  326    MEDICAL INFO  2837/7A     FEB  8, 1988  14:52   11
GARDNER,JOSEPH       333-44-5555  ADM1  201    MEDICAL INFO  2837/7A     FEB  2, 1988  12:27   17
                                               ---------------
SUBCOUNT                                        2

              Borrower: Podiatry
FLINT,JOHN           234-56-7890  MR2   356    PODIATRY      3425/534D   JAN 12, 1988  08:57   40
GRAY,JOSEPH          445-65-6565  MR1   293    PODIATRY      3425/534D   DEC 21, 1987  10:49   59
HILL,THOMAS          555-67-8969  MR1   325    PODIATRY      3425/534D   JAN 15, 1988  11:26    37
SHELDON,HOWARD       666-33-6666  MR1   309    PODIATRY      3425/534D   FEB 17, 1988  15:25   4
THOMAS,EDWARD        765-43-2132  MR1   278    PODIATRY      3425/534D   FEB  5,1988   08"34   16
                                               ---------------
SUBCOUNT                                        5
                                               ---------------
COUNT                                           14
```

Management Reports Menu
Pending Request List

The Pending Request List option is used to print a list of pending requests for patient's records. Which requests appear will depend on how the Pending Request Cutoff site parameter is set at your facility for each record type. Requests that have been printed will not be displayed nor will any requests for dates past the date the printout is run. The requests are listed in alphabetical. You may include unfilled clinic requests on the report.

At multi-division facilities, the records on the list will be separated by division and displayed under the division with which they are associated.

Information provided on the display includes date of printout, patient name and last four digits of SSN, record type and number, current location, phone and room number of current location, request number, requestor, and date/time record needed. The total number of requests pending is also given.

The institution of the file room from which you are tracking records is automatically displayed after the option is selected.

You will be prompted for whether or not you want to include unfilled clinic requests on the list and a device.

Example

```
Institution: Augusta, GA

Do you want to include un-filled clinic requests? No//   YES

DEVICE: A143//   <RET>    HALLWAY PRINTER     RIGHT MARGIN: 132//   <RET>

WANT TO FREE UP THIS TERMINAL? NO// YES   (YES)
THIS TERMINAL IS NOW FREE



Pending Requests                                          FEB 9,1988  08:46    PAGE 1
                            CURRENT                                  DATE/TIME RECORD
NAME              TYPE  REC#  LOCATION        Phone/Room    REQ#  REQUESTOR  NEEDED
------------------------------------------------------------------------------------------
         Institution: AUGUSTA DOM
CARTER,JERRY      MR1   388   GI CLINIC       23 4/645D      292   CHIEF,MAS  FEB  9,1988 09:00
         Institution: AUGUSTA MC
AARON,CAROLE      MR2   430   MAIN FILE ROOM  548/Suite 300  213   ENNIS,MARK FEB  8,1988
BARKLEY,HENRY     ADM1  167   MAIN FILE ROOM  548/Suite 300  288   ENNIS,MARK FEB  8 ,1988
GARTNER,PAUL      MR1   311   CORRESPONDENCE  376/456A       374   DERM CL    FEB  6,1988 11:00
LANGLEY,MICHAEL   MR3   214   MAIN FILE ROOM  548/Suite 300  269   DERM CL    FEB  6,1988 11:30
TURNBULL,ISAAC    ADM2  183   FEE BILLING     691/870B       300   GI CL      FEB  7,1988 14:30
VICTOR,STANLEY    ADM1  329   MAIN FILE ROOM  548/Suite 300  255   JONES,JANE FEB  9,1988

     Total Requests Pending: 7
```

Management Reports Menu
Records Charged to a Borrower

The Records Charged to a Borrower option is used to display a list of records currently charged to a particular borrower. The selected borrower must be in the BORROWER file. The records are listed in alphabetical order and are separated by record type.

The number (if any) that appears in the "Days Overdue" column of the display depends on how the Overdue Record Cutoff site parameter is set at your facility for each record type. This parameter is set to the number of days this record type may be borrowed from its home file room before being considered overdue.

Information provided in the output includes borrower's name, phone and room number, printout run date, record type, volume number, patient name, date record charged to this borrower and days overdue (if any). If there are no records charged to the selected borrower in the selected application, the system will display a message stating this.

Example

MAS Application


```
Select Borrower:  DOUGLAS,CASSIE     DOUGLAS,CASSIE
         ...OK? YES//  <RET>   (YES)    MEDICAL ADMINISTRATION
DEVICE: HOME//  <RET>       RIGHT MARGIN: 80//   <RET>



        **** MEDICAL ADMINISTRATION Folders Currently Charged to Borrower ****
================================================================================
Borrower    : DOUGLAS,CASSIE                            Page: 1
Phone/Location: 345/567B                     Run Date: FEB 16, 1988  08:54
================================================================================

  Record Type       Vol   PATIENT          Charged Sin ce...        Days Overdue
  -----------       ---   -------          -----------------        ------------
  MEDICAL RECORD    V1    CHRISTOPHER,PAU  DEC 15, 1987  12:48          62
  MEDICAL RECORD    V2    LEACH,STEPHEN    FEB 10, 1988  11:3 1          5
--------------------------------------------------------------------------------
  ADMINISTRATIVE F  V1    PICKLES,RUSSELL  FEB  5, 1988  10:36          10
  ADMINISTRATIVE F  V2    KEENE,THERESA    JAN 15, 1988  09:37          3 1
  ADMINISTRATIVE F  V1    NOONE,FREDERICK  DEC  2, 1987  15:29          75
```

Management Reports Menu
Records Charged to a Borrower

Radiology Application


```
Select Borrower:  PULMONARY CLINIC    PULMONARY CLINIC
          ...OK? YES//  <RET>  (YES)        RADIOLOGY
DEVICE: HOME//  <RET>      RIGHT MARGIN: 80//  <RET>




                **** RADIOLOGY Folders Currently Charged to Borrower ****
================================================================================
Borrower    : PULMONARY CLINIC                        Page: 1
Phone/Location: 212/343D                    Run Date: FEB 18, 1988  13:46
================================================================================

   Record Type        Vol   PATIENT        Charged Since...         Days Overdue
   -----------        ---   -------        -----------------        ------------
   MASTER FOLDER      V1    TOOHEY,JOSEPH    DEC 29, 1987  12:48        39
   MASTER FOLDER      V1    ARSENAULT,JOHN   JAN 10, 1988  07:32        29
   --------------------------------------------------------------------------
   CHEST FILMS        V1    FANDL,JACKSON    FEB 11, 1988  11:26
   CHEST FILMS        V1    GROSS,SHARON     JAN 22, 1988  08:17        17
```

Management Reports Menu
Requests Pending for a Borrower

The Requests Pending for a Borrower option is used to display a list of pending requests for patients' records for a particular borrower. The selected borrower must be in the BORROWER file. Which requests are displayed in the output will depend on how the Pending Request Cutoff site parameter is set at your facility. The requests are listed in alphabetical order and are separated by record type.

Information provided in the output includes borrower's name, phone and room number, printout run date, record type, volume number, patient name, date/time record needed and associated requests. If the request is part of a pull list, it is indicated as such by an asterisk (*). If there are no requests pending for the selected borrower in the selected application, the system will display a message stating this.

Example

MAS Application

```
Select Borrower:  MCINTYRE,C   MCINTYRE, CHRISTINE
        ...OK? YES//  <RET>  (YES)    MEDICAL ADMINISTRATION
DEVICE: HOME//  <RET>       RIGHT MARGIN: 80//  <RET>



            **** MEDICAL ADMINISTRATION Requests Pending for Borrower ****
==============================================================================
Borrower    : MCINTYRE,CHRISTINE                    Page: 1
Phone/Location: 214/645D                   Run Date: FEB 12, 1988   08:29
==============================================================================
* - indicates request is part of a pull list

   Record Type          Vol  PATIENT          Date/Time Needed      Associated
Req
   ----------           ---  -------          ---------------       ------------
-
1  MEDICAL RECORD       V1   DAIGLE,STEPHEN   FEB 11, 1988
2  MEDICAL RECORD       V2   *DANSEREAU,PIERRE FEB 12, 1988
------------------------------------------------------------------------------
-
3. ADMINISTRATIVE FOLDER  V1   ASSANTE,RAMON    FEB 10, 1988
4. ADMINISTRATIVE FOLDER  V1   BLACK,GERARD     FEB 10, 1988
5. ADMINISTRATIVE FOLDER  V1   SENTRY,ANNE      FEB  8, 1988  09:00
```

Management Reports Menu
Requests Pending for a Borrower

Radiology Application

```
Select Borrower:  WHELAND,A   WHELAND,ALLISON
        ...OK? YES//  <RET>  (YES)     RADIOLOGY
DEVICE: HOME//  <RET>       RIGHT MARGIN: 80//   <RET>



                  **** RADIOLOGY Requests Pending for Borrower ****
================================================================================
Borrower     : WHELAND,ALLISON                       Page: 1
Phone/Location: 566/890B                       Run Date: FEB 16, 1988   13:30
================================================================================
* - indicates request is part of a pull list

   Record Type      Vol  PATIENT            Date/Time Needed     Associated Req
   ----------       ---  -------            ----------------     --------------
1  MASTER FOLDER    V1   MASTERSON,ELIZABETH  FEB 12, 1988
2  MASTER FOLDER    V1   BEVEVINO,MARTIN      FEB 11, 1988
```

Management Reports Menu
Retrieval Rate Statistics

The Retrieval Rate Statistics option provides a breakdown by request status of record requests associated with pull lists and provides a percentage of the number of requests filled. Based on the number of record requests and the number charged, the system will compute and display a retrieval rate percentage.

Reports (excluding single pull list) may be generated as detailed or summary. Detailed reports may be further sorted alphabetically or by division. The report may be run for a specified date range, a single day or a single pull list.

Detailed reports and single pull list reports will list the total number of record requests (exclusive of cancelled requests), # charged, # cancelled, # not fillable and # requested (still pending) for each pull list and a total page. The summary report consists of only the total page.

Example

```
   Select one of the following:

           1    Date Range
           2    One Day
           3    Single Pull List

Enter Response: 1 Date Range

   Select one of the following:

           D    Detailed
           S    Summary

Type of Report: Summary// DETAILED

   Select one of the following:

           D    Division
           A    Alphabetic

Sorted by: Alphabetic// DIVISION
FROM DATE: 1-1-91    (JAN 01, 1991)
  TO DATE: 4 1 91    (APR 01, 1991)
DEVICE: HOME// MAS REPORT PRTR    MAS OFFICE      RIGHT MARGIN: 132// <RET>
DO YOU WANT YOUR OUTPUT QUEUED? NO// Y    (YES)

Requested Start Time: NOW// <RET>    (JUN 11, 1991@13:06:19)
```

Management Reports Menu
Retrieval Rate Statistics

```
                        ***** PULL LIST STATS *****
================================================================================
Pull List: Date Range                    Date Ranges: 01/01/91 to 04/01/91
Run Date:  JUN 11, 1991@13:06            PAGE: 1
================================================================================

Pull List Total Requests Retrieval Rate #Charged Cancelled Not Fillable # Requested
--------- -------------- -------------- -------- --------- ------------ -----------
    500
MED  [01/07/91]    2        100.00%          2        0          0           0
SURG [02/10/91]    2          0.00%          0        0          0           2
                 ----      -------        ----     ----       ----        ----
                   4         50.00%          2        0          0           0

                        ***** PULL LIST STATS *****
================================================================================
Pull List: Date Range                    Date Ranges: 01/01/91 to 04/01/91
Run Date:  JUN 11, 1991@13:06            PAGE: 2
================================================================================

Total Entire Pull List

  #Charged  Cancelled  Not Fillable  # Requested
  --------  ---------  ------------  -----------
     2          0           0            2


TOTAL REQUESTS=>  4

RETRIEVAL RATE=>  50.00%
```

System Definition Menu

Listed below are general items you may wish to consider prior to setting up your application.

- Review the Record Tracking User Manual.

- What records do you wish to track? Only medical records or medical and administrative records? Only master jackets or all types of radiology records?

- What file room(s) do you wish to track records from? Do you wish to track records from inactive file rooms as well as active ones?

- What admitting/imaging areas should be included in your set-up? A Radiology department may have multiple imaging areas (i.e., Ultrasound, Nuclear Medicine, Diagnostic) and wish to track records from these areas separately. If this is the case, each must be defined in your system.

- Do you wish to use the standard label formats which accompany this package or format your own? (Samples of the standard labels may be viewed in the Label Formatter Section of this guide.)

- A major part of the installation process is the definition of record borrowers; i.e., clinics, wards, physicians, clinic clerks, other individuals, other areas, etc. There will probably be a number of borrowers in your system making this a time-consuming effort. It is very helpful if all borrowers are identified prior to commencing with this process.

- If you are installing Record Tracking for the MAS application, attention needs to be given to records which will be requested for clinics and the admitting area. For these areas, you should establish a general rule of thumb as to what records need to be routinely requested; i.e., the latest volume of the patient's medical record. This will be defined through the Application Set-up or Admitting Area Set-up options, as applicable. You should identify those clinics/admitting areas who will need other than the default records. Some clinics may require ALL volumes of a patient's medical record; x-rays may be required; if so, which x-rays should be requested for which clinics?

- As part of the initialization process, the Site Manager will perform a BORROWER INITIALIZATION (using the Borrower Initialization option, Computer Site Manager's Menu). This process looks at the HOSPITAL LOCATION, WARD LOCATION, AND NEW PERSON files, and places all "active" clinics, wards, and persons in the BORROWER/FILE AREAS file, making them eligible to become actual record borrowers. It is the first step in initializing borrowers. You may not wish to have ALL of these entries become actual borrowers in the Record Tracking system, however.

- In order to activate them as borrowers, they need to be defined through the Borrower Set-up option, taking into account the above considerations. Although you will have defined DEFAULT RECORDS TO BE REQUESTED through the Application Set-up or Admitting Area Set-up options, it is necessary to define the records needed for each of these types of borrowers when entering them in the Borrower Set-up option.

- Each individual who will be a borrower should also be defined by name through the Borrower Set-up; i.e., ward clerks, clinic clerks, secretaries, etc. As long as these individuals are part of the PERSON file, they may be activated as borrowers through this option. You may have certain areas of your facility which are not defined in either the HOSPITAL LOCATION, WARD LOCATION or NEW PERSON files; i.e., Correspondence Unit, Medical Information Section, Details Clerk, etc. In order to enter areas such as these, it is necessary for them to be defined in the appropriate file. See your site manager to accomplish this task.

- How do you wish to handle printing of barcode labels? All at once or as patients report for care? If printed all at once, labels for inactive patients will be included in the run. (The system checks for expired patients and does not run labels for them.) The additional labels printed for inactive patients may outweigh the benefits of having your file room barcoded in the shortest amount of time.

- Who should receive what security keys?

You are now ready to begin defining the parameters for your application. You should begin with File Room Set-up.

NOTE: The first file room must be defined with the site manager using the RT OVERALL Menu. Subsequent file rooms may be defined using the RT MAS/RAD SUPER Menu.

Upon entering the Record Tracking Menu (through RT OVERALL), a prompt for a file room will appear. This prompt should be disregarded (by entering a <RET>) as no file rooms yet exist.

System Definition Menu
Application Set-up

This option is used to enter/edit application-specific parameters. Prior to defining the parameters in this option, you must have first completed defining parameters in the following System Definition options: File Room Set-up, Label Formatter (if you are not using the standard labels), and Type of Records Set-up.

This option is broken into four major categories. Two of these pertain to both the Radiology and Medical Administration applications; Application Parameter Set-up and Institution Parameters. Two additional categories are included in the MAS application which provide for definition of parameters related to record requests for clinics; Default MAS Record Requests for Clinics and Default Radiology Folder Requests for Clinics that Require Films.

Field Descriptions

{MAS/RAD} Application Parameter Set-Up

DEFAULT RECORD CREATION TYPE	Enter the type of record the system should initially create for a patient in this application. All records which have been defined as LINKED RECORDS to this record type (through Type of Record Set-up) will also be created.
PROFILE/REPORT HEADER	This field allows you to specify the heading which should appear on the Record Inquiry and Trace Movement History reports (accessed through the Record Information Menu). For example, MAS may wish to enter Consolidated Health Record; Radiology may wish to enter Film Jacket. If you are using Record Tracking for other purposes (perhaps a library setting), you would enter something more appropriate to that setting.
BORROWER BARCODE FORMAT	Specify the type of barcode label (either the standard or one defined at your site) to be printed for borrowers associated with this application. It is not necessary to have barcode labels printed for borrowers in order for the system to go live.

System Definition Menu
Application Set-up

Default MAS Record Requests for Clinics

Select MAS RECORD   Specify the MAS record type(s) which should
                           automatically be requested for scheduled clinic
                           appointments to those clinics which require records;
                           i.e., medical folder.

MAS RECORD   Your entry at "Select MAS RECORD" will appear as a
                           default. You may delete it (by entering <@>), enter a
                           different record type, or accept the default.

VOLUMES NEEDED   Enter the volumes which should automatically be
                           requested for each clinic. Choose from ALL, LAST,
                           NONE.

Default Radiology Folder Requests for Clinics that Require Films

Select RADIOLOGY   For clinics which also require films, specify each
FOLDER   Radiology record type(s) which should automatically
                           be requested for scheduled clinic appointments. For
                           each entry in this field, the following two fields will
                           be prompted.

RADIOLOGY   Your entry at "Select RADIOLOGY FOLDER" will
FOLDER   appear as a default. You may delete it, enter a
                           different one, or accept the default.

VOLUMES   Enter the volumes of this record type which should
NEEDED   automatically be requested for each clinic. Choose
                           from ALL, LAST, NONE.

System Definition Menu
Application Set-up

Institution Parameters

Select INSTITUTION   Enter the main institution name, number or
                            station number (from your INSTITUTION
                            file) associated with this application.

INSTITUTION   Your entry at "Select INSTITUTION" will appear
                            as a default. If incorrect, you may select another
                            institution.

CENTRAL FILE ROOM   Enter the central file room associated with this
                            application and institution. The system only allows
                            file rooms associated with this application and
                            institution through File Room Set-up.

DEFAULT PULL   Specify the method by which pull lists should be
LIST SORT   sorted for this application. Choose from:

                            'T'ERMINAL DIGITS
                            'C'LINIC NAME THEN TERMINAL DIGITS
                            'A'PPOINTMENT TIME
                            'H'OME LOCATION, THEN TERMINAL DIGIT
                            'D'ETAILED-HOME LOC, CLINIC, THEN TERMINAL DIGIT

Record Type Parameters Within {INSTITUTION}

For each record type defined, define the following fields.

Select TYPE   Enter each record type associated with this
OF RECORD   application for this institution. For each entry made
                            in this field, the following three fields will be
                            prompted, returning you to this prompt upon
                            completion.

TYPE OF   Your entry at "Select TYPE OF RECORD" will
RECORD   appear as a default. You may accept the default,
                            enter the correct record type, or delete it.

System Definition Menu
Application Set-up

DEFAULT   Enter the home location the system should assign
HOME LOCATION   to records when they are created initially. Generally,
                      this will be a file room. For example, you may wish
                      to enter your main MAS file room as the home location
                      for medical and administrative records.

DEFAULT   Enter the borrower (from BORROWERS/FILE AREA
INITIAL   file) the system should automatically charge a record
BORROWER   to when it is initially created for this application.
                      For example, if a patient's administrative and medical
                      folders are initially created by your Admitting area,
                      you may wish to assign the Admitting area as the
                      DEFAULT INITIAL BORROWER.

Clinic Initialization Request Parameters

EXCLUDE   Yes/No   Set to YES if you wish to exclude in-
INPATIENTS   patients with clinic appointments from pull lists.

Select EXCLUDE   Any appointment type in the APPOINTMENT
APPOINTMENT   TYPE file (#409.1) may be entered and
TYPES   appointments for these types will not
                      appear on clinic pull lists.

CREATE RECORDS-   Yes/No   Set to NO if you do NOT wish to have a
CLINIC REQUESTS   request, pull list and record created if a clinic
                      appointment is made for a patient with no record.

DEFAULT   Borrower/File Area entry   If this field contains a
SCHEDULED   borrower, the Clinic Initializer will create a pull list
ADMISSIONS   from entries in the SCHEDULED ADMISSION file.
                      Any entry in the SCHEDULED ADMISSION file that
                      does NOT have a corresponding ward or treating
                      specialty in the BORROWERS file will appear on this

System Definition Menu
Application Set-up

Record Retirement Parameters

DEFAULT
RETIREMENT
BORROWER

When records are charged out, they will be "inactivated" to this borrower with a movement type of TRANSFER RETIRE. The borrower entered here will show as the default borrower at the "Select Record Retirement Borrower:" prompt in the Charge Out/Transfer Retirement Pull Lists option of the Inactivate Records Menu. Only borrowers from the BORROWERS/FILE AREA file may be entered. This borrower will usually be a "federal record center".

DEFAULT
PERPETUAL
RECORD

The record type that should be created when records are retired. The record type entered here will appear in the "Do you want to create '{record type}' records from Pull list? Yes//" prompt in the Charge Out/Transfer Retirement Pull Lists option of the Inactivate Records Menu.

System Definition Menu
File Room Set-up

This option is used to enter/edit and define/update parameters for the file rooms in your application and associate them with the correct institution. Entries made here go into your HOSPITAL LOCATION file (#44) and are assigned a type of "F". They also become part of your BORROWERS/FILE AREAS file (#195.9). This option operates the same for both MAS and Radiology applications.

NOTE: The first file room must be defined by the site manager using the RT Overall Menu. Subsequent file rooms may be defined using this option.

Field Descriptions

Select File Room

Enter the name of the file room. Multiple file rooms may be entered for an application. For each file room entered, the following fields will be prompted, returning you to this prompt for subsequent entries. You should enter all file rooms in your application which will be associated with Record Tracking.

ARE YOU ADDING
(File Room) AS
A NEW HOSPITAL
LOCATION?

YES/NO - This will only be prompted if your entry at "Select File Room" was new.

PHONE #

Enter the telephone number of the file room; 1-15 characters in length.

LOCATION/ROOM #

Enter the location/room # of the file room.

RECORD SORT

Enter the method by which this file room sorts its records. Choose from:

'A'LPHA (Sorts records alphabetically)
'T'ERMINAL DIGITS (Sorts records by terminal digit of social security number)

System Definition Menu
File Room Set-up

ACTION IF HOME   Specify which action should be taken when the
IS DIFFERENT   home file room of a record selected for transaction is
                        different from the one the user is associated with; i.e. a
                        radiology folder is selected for check-in to the MAS file
                        room. Choose from:

                        'N'O ACTION
                        'A'UTOMATICALLY CHANGE
                        'Q'UESTION THE USER ABOUT CHANGE
                        'D'ISPLAY WARNING ONLY

Hospital Location File Parameters

NAME   Your entry at "Select File Room" will appear as a
                        default. You may rename the file room (answer must
                        be 2-30 characters in length) or accept the default by
                        entering <RET>. Unless you hold the necessary
                        FileMan access, you will be unable to delete a file
                        room. See your site manager if it is necessary to delete
                        a file room.

INSTITUTION   Enter the institution number, name or station number
                        (from your INSTITUTION file) with which this file
                        room is associated.

System Definition Menu
Type of Record Set-up

This option is used to enter and define parameters for the record types associated with this application. This option operates the same for both the MAS and Radiology applications.

Field Descriptions

Select Record Type	Enter the record type you wish to define. This is a multiple field. For each entry in this field, the following fields will be prompted, returning you to this prompt until no more entries are made. You should enter each record type (i e., medical, administrative, master jacket, etc.) associated with your application which will be tracked.
ARE YOU ADDING {Record/Type} AS A NEW RECORD TYPE?	YES/NO - This will only be prompted if your entry at "Select Record Type" was new.
NAME	Your entry at "Select Record Type" will appear as a default. You may rename the record type (must be 3-30 characters), delete it along with all associated parameters by entering <@>, or accept the default.
ABBREVIATION	Enter an abbreviation (if any) by which this record type is known. Answer may be 1-3 characters in length.
CAN RECORD BE REQUESTED?	YES/NO - Should users be allowed to enter requests for this record type?
IS RECORD TEMPORARY	YES/NO - If YES, record can only be charged out once.
ASK FOR CONTENT DESCRIPTOR?	YES/NO - Should user be prompted to enter a description of the contents of this record type when it is created for a patient. This description will be displayed beneath the record on record inquiry.

System Definition Menu
Type of Record Set-up

MULTIPLE VOLUMES   YES/NO - Can there be more than one volume
ALLOWED   of this record type per patient?

DESCRIPTION   Enter a description of the record type.

INQUIRY   Specify (numerically) the order in which
DISPLAY ORDER   this record type should appear on the record
inquiry. For example, specify 1 to have it appear
first; 2 to appear second, etc.

INACTIVATION   Specify a date on which users will no longer be
DATE   able to create this record type. After this date, it will
no longer be possible to create records of this type;
however, existing records will remain until they are
inactivated through the Inactivate/Reactivate Records
option. Leave blank if you wish no inactivation date.

Label Format Specifications

RECORD LABEL   Specify the record label type (the standard or one
FORMAT   defined at your site) which should be used for printing
labels associated with this record type.

REQUEST   Specify the label type which should be used when
NOTICE FORMAT   request labels are printed for requests of this record
type (as defined through Label Formatter).

Cutoff/Purge Parameters

PENDING   Specify the number of days an unfilled request for
REQUEST CUTOFF   this record type may remain in the system and
(days)   considered pending before reverting to a status of
unfilled.

OVERDUE   Specify the number of days this record type may
RECORD CUTOFF   be borrowed from its home file room before being
(days)   considered overdue and appearing on the Overdue
Records List.

System Definition Menu
Type of Record Set-up

BARCODE RENEWAL
CUTOFF (days)

Specify the number of days required to consider reprinting a barcode label. This value is used to determine if new barcodes should be printed with pull lists. The date barcode last printed is compared with this value and a new barcode is printed if it is "old". A null value will disable printing barcodes with pull lists.

PENDING CHECK-IN
CUTOFF (days)

Specify the number of days a pending request will be displayed for a record when the record is being checked-in. If not set, records with pending requests are flagged depending on the PENDING REQUEST CUTOFF parameter. If ZERO, pending requests will not be flagged.

RETIRE RECORD
CUTOFF (days)

Specify the number of days required for a record to have no activity before it is considered for retirement. When record retirement pull lists are generated, records with no activity for this amount of time are added to the pull lists.

CURRENT
BORROWER
FUTURE REQUEST
TIME
MINIMUM (minutes)

This field is used to specify the earliest future date/time (in minutes) the current borrower of a record may request that same record for the future. For example, Medical Clinic has Mr. Jones' record today for an appointment and will be seeing him again tomorrow. Should Medical Clinic request the record for tomorrow or retain it in the clinic? In making an entry in this field, you should consider your entry at the previous prompt, OVERDUE RECORD CUTOFF.

PREVIOUS
MOVEMENTS
TO RETAIN

Enter the number of previous movements (i.e., charge-outs, check-ins, etc.) which should be retained for this record type. This is the number of movements which will be shown on the Trace Movement History, useful in searching for lost records.

System Definition Menu
Type of Record Set-up

REQUEST PURGE   Enter the number of days requests (filled and
CUTOFF (days)   pending) should be retained in the system (and
                          therefore displayed upon access) before being purged.

PULL LIST   Enter the number of days pull lists should
PURGE CUTOFF (days)   remain in the system before being purged.

OK TO PURGE   YES/NO - It is advisable that an entry of NO be
DATA?   made to this field until you are actually ready to begin
                          purging of data.

Missing Record Control Parameter

CONTROL OF   If a record of this type is flagged as missing, who
FINDING RECORDS   may remove the flag? Choose from:

                          'F'ILE ROOM SUPERVISOR ONLY (must hold FR
                          SUPERVISOR key)
                          'A'NY USER

Other Records to Create When Initializing the {Record Type}

Select LINKED   Specify other record types (if any) which should
RECORDS   also be created when this record type is initially
                          created for a patient. For example, you may wish to
                          have an administrative folder created when the
                          patient's first medical folder is created. The record
                          type specified must be defined in your application.

File Rooms Allowed to Store {Record Type}

Select FILE   Specify the file room(s) (as defined in File Room
ROOM   Set-up) which may store this record type. You will
                          return to this prompt repeatedly and should specify
                          ALL file rooms which will be storing this record type.

System Definition Menu
Reasons File Set-up

This option is used to enter/edit allowable reasons for cancelling requests and missing records and associate them with the function for which they may be used. For example, you may wish to enter "Not Charged Out" as an allowable reason for a missing record. Entries made through this option will become part of your REASONS file (#195.6).

Field Descriptions

Select REASON	Enter new or existing reason. This is a multiple field. For each entry made in this field, the following fields will be prompted, returning you to this prompt at completion.
ARE YOU ADDING {Reason} AS A NEW REASON?	YES/NO - This will only be prompted if your entry at "Select REASON" was new.
NAME	Your entry at "Select Reason" will appear as a default at this prompt. You may rename the reason, delete it and all associated parameters, or accept the default.
TYPE OF REASON	Enter the function with which this reason is to be associated. Choose from:
	'C'ANCEL REQUEST - limits use of this reason to cancelling requests.
	'M'ISSING RECORD - limits use of this reason to missing records.
	'G'ENERAL - allows the reason to be used anywhere.
DESCRIPTION	You may enter a free text explanation of the reason.

System Definition Menu
Label Functions Menu
Label Formatter

This option allows design of your own barcode label formats. It is an optional step in the installation process as three standard label formats are included in the Record Tracking package (record, request, and borrower). Examples of the standard labels which accompany this package as well as a list of selectable fields for each label type format may be found at the end of this option documentation. It is recommended you use the standard label formats, as design of label formats is somewhat precarious. **UNDER NO CIRCUMSTANCES SHOULD THE EXISTING STANDARD LABEL FORMATS BE EDITED.**

Below is additional information on answering key prompts.

Select FIELD
Enter the name of the field corresponding to the first bit of information which will appear on the label. For each entry made at this prompt you will subsequently be prompted for a row, column, and title, returning to this prompt repeatedly until no more entries are made. Even though you are subsequently prompted for location of the information, it is important that actual entry be made in the order it will appear on the label. In some instances, failure to do so may result in an error in your format. In order to have the barcode printed on the label, you should select BARCODE FOR RECORD as a field. It is advisable that this be your last selection. The list of selectable fields will vary depending upon whether you are defining a record, borrower, or request label. You may enter a <?> at this prompt for a list of fields applicable to your label.

NUMBER OF ROWS IN FORMAT
Enter the total number of rows in your format. You should account for blank lines in your total. If you specified BARCODE FOR RECORD as one of your fields, increase your total by one. If you wish to include blank lines between the last line of data and the beginning of the barcode, enter a number correspondingly higher to the number of line feeds you desire. An error in your format will result if the number entered at this Step is too low to provide space for all the information specified.

Please follow the instructions closely, as failure to do so may result in an error in your format. At the conclusion of formatting, a sample will be displayed on the screen. No barcode will be shown. In order to actually test the label format with a barcode, you should use the Test Label Formatter option.

System Definition Menu
Label Functions Menu
Label Formatter

Editing of your site-specific label format specifications is risky. It editing is
necessary, it is recommended you delete the label format and begin again.

Compiled logic of the label format specified may be viewed through FileMan by
inquiry to the LABEL FORMAT file (#194.4).

Example

```
Select LABEL FORMAT NAME: TEST RECORD
   ARE YOU ADDING 'TEST RECORD' AS A NEW LABEL FORMAT? Y (YES)
NAME: TEST RECORD// <RET>
TYPE OF LABEL: R  RECORD
Select FIELD: NAME
  ROW: 1
  COLUMN: 1
  TITLE(OPTIONAL): NONE
Select FIELD: SSN
  ROW: 3
  COLUMN: 1
  TITLE(OPTIONAL): <RET>
Select FIELD: TYPE OF RECORD
  ROW: 4
  COLUMN: 1
  TITLE(OPTIONAL): NONE
Select FIELD: VOLUME NUMBER
  ROW: 4
  COLUMN: 20
  TITLE(OPTIONAL): VOL #:
Select FIELD: BARCODE FOR RECORD
Select FIELD: <RET>
NUMBER OF ROWS IN FORMAT: 10

    ...format 'TEST RECORD' has been compiled.

<<<<<<-------------------Column
No.------------------->>>>>>>>>>

0-------1-------2-------3-------4-------5-------6-------7-------8
1       0       0       0       0       0       0       0       0

DOE, JANE

SSN:999-99-9999 MEDICAL RECORD     VOL #: 1
500/1202029
```

System Definition Menu
Label Functions Menu
Label Formatter

Following is a list of selectable fields for each label type format.

RECORD LABEL   REQUEST LABEL   BORROWER LABEL

AGE   AGE   BARCODE FOR BORROWER
BARCODE FOR RECORD   BARCODE FOR RECORD   BORROWER'S LOCATION
CLAIM NUMBER   BARCODE FOR REQUEST   BORROWER'S PHONE
CURRENT DATE/TIME   CLAIM NUMBER   CURRENT DATE/TIME
DATE OF BIRTH   CURRENT BORROWER/LOCATION   FREE TEXT
FREE TEXT   CURRENT DATE/TIME   NAME
HOME LOCATION   CURRENT PHONE #
NAME   CURRENT ROOM #
RECORD #   DATE OF BIRTH
SERVICE CONNECTED   FREE TEXT
SEX   HOME LOCATION
SSN   NAME
TYPE OF RECORD   RECORD #
VETERAN   REQUEST #
VOLUME NUMBER   REQUEST COMMENT
                             REQUESTED DATE/TIME
                             REQUESTING USER
                             REQUESTOR
                             REQUESTOR'S INSTITUTION
                             REQUESTOR'S LOCATION
                             REQUESTOR'S PHONE
                             SERVICE CONNECTED
                             SEX
                             SSN
                             TYPE OF RECORD
                             VETERAN
                             VOLUME NUMBER

System Definition Menu
Label Functions Menu
Test Label Formatter

The Test Label Format option is used to print a label format with the barcode. The Label Formatter option allows design of barcode label formats but when generated no barcode is shown. This option should be used to test the label format with the barcode.

Example

```
DOE,JANE

SSN:999-99-9999
MEDICAL RECORD     VOL #:  999


||||||||||||||||||||||||||||||
||||||||||||||||||||||||||||||
||||||||||||||||||||||||||||||
||||||||||||||||||||||||||||||
||||||||||||||||||||||||||||||
          *500/1202029*
```
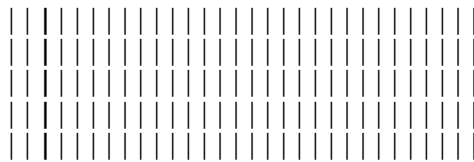
System Definition Menu
Borrower Set-up

This option is used to enter and define/update parameters of specific borrowers and associate them with the correct institution. As discussed in the overview of this section, you will need to define EACH borrower through this option. Please refer to that overview for further clarification. This option may also be used to revoke or inactivate a borrower's privileges.

Field Descriptions

Select Borrower
Enter the borrower (from BORROWERS/FILE AREAS File) for which you wish to define parameters. This is a multiple field. For each entry made into this field, the following three fields will be asked, returning you to this prompt upon completion.

PHONE #
Enter borrower's phone number.

LOCATION/ROOM#
Enter borrower's location or room #.

BORROWING PRIVILEGES
Enter borrower's borrowing privileges. Choose from:

'N'ORMAL
'I'NACTIVATED
'R'EVOKED

Hospital Location File Parameters

NAME
Your entry at "Select Borrower" will appear as a default at this prompt. You may rename the borrower or accept the default. Unless you hold the proper FileMan access, you will be unable to delete a borrower. See your site manager should this be necessary.

INSTITUTION
Enter the institution name, number or station number this borrower is associated with.

Select SYNONYM
You may enter a synonym for the borrower, if you wish; i.e., GEN MED for General Medical clinic.

System Definition Menu
Borrower Set-up

The next four parameters will appear if the borrower is an admitting area/clinic in the MAS application or a file room/imaging area in the Radiology application.

Record Request to be Made When Making an Appt or Registering a Pt

REQUESTS FOR
WHICH BORROWER

Enter the borrower's name to be associated with requests. Default will be your entry at "Select Borrower".

ARE RECORDS
REQUIRED?

YES/NO   When appointments are scheduled in association with this borrower, are records required? If YES, you will proceed through the next three prompts.

Select RECORD
TYPE NEEDED

Enter each record type which is needed in association with these appointments.

VOLUMES
REQUIRED

Enter what volumes of this record type will be needed for scheduled appointments. Choose from ALL, LAST, NONE.

Scheduled Admissions Borrowers

SCHEDULED
ADMISSION
BORROWER

YES/NO   If YES, when an entry in the SCHEDULED ADMISSIONS file has a type WARD and the ward location matches this ward location borrower, a pull list will be created for this ward location borrower or associated borrower.

TREATING
SPECIALTY

BORROWER/FILE AREA entry - If an entry in the SCHEDULED ADMISSIONS file has a type TREATING SPECIALTY and the treating specialty matches this borrower's treating specialty, a pull list will be created for this borrower or associated borrower.

System Definition Menu
Print Borrower Barcode

This option is used to print borrower barcode labels. The label printed will be the label type specified for borrowers in your Application Set-up.

You will be prompted to select a borrower. If the borrower selected appears in your BORROWERS/FILE AREAS file, the system will accept your entry and either display a message informing you the barcode label has been queued to print on your default device, or prompt you to select a device on which to print, depending upon the specifications outlined at your particular site. You may either select another borrower or enter a <RET> to return to the menu.

System Definition Menu
Movement Type Set-up

This option is used to change the parameters for the various movement types in your application. The option will operate the same for both the MAS and Radiology applications. Movement types may not be deleted.

Field Descriptions

Select MOVEMENT TYPE	Enter the movement type you wish to define. You may choose from a list of established movement types for your application. Enter a <?> for a list.
NAME	No editing allowed. Enter a <RET> to continue or <^> to return to the first prompt.
DISPLAY MESSAGE	Enter a message (if any) you wish to have displayed when this movement type is taking place.
INCLUDE ON OVERDUE REPORT	YES/NO - Should records involved in this movement type be included on the Overdue Records Report?

Inactivate Records Menu

The purpose of the Inactivate Records Menu is to perform record retirement tasks. Many options on this menu are similar or even identical to options in other menus; however, their purpose here is specific to record retirement.

Through this menu, record retirement pull lists are created and printed. Any records on the list that should not be retired are designated as not fillable. If there was a record on the list that did not actually exist, that record would be deleted. You would then create a perpetual record for each record on the pull list. The perpetual record would hold summary information you wish to retain once the record is retired. When all exceptions have been taken, the pull list is charged out or transferred. Records on the list are inactivated and transferred to the appropriate facility.

Below is a descriptive listing of the options on this menu.

GENERATE RECORD RETIREMENT PULL LISTS - Used to create record retirement pull lists. These pull lists are generated by scanning record movements. If there has been no movements within the record retirement window (number of days entered in the RETIRE RECORD CUTOFF field) and the record does not have a REASON NOT TO RETIRE field set, a request for the record is added to the pull list.

PRINT RECORD RETIREMENT PULL LIST - Used to print record retirement pull lists. Record retirement pull lists are used to find records to be retired and transferred to a record archive center, and as a guide for creating the perpetual record that is retained from the retired records.

DESIGNATE RETIREMENT REQUESTS AS 'NOT FILLABLE' - Used to designate requests on record retirement pull lists as not fillable (records you do not wish to retire). Requests with a status of NOT FILLABLE may also be changed to REQUESTED through this option.

DELETE A RECORD - Used to delete records in the Record Tracking system. Records are deleted when volumes are combined or when the actual corresponding record does not exist.

CREATE A LABEL/RECORD/VOLUME - The purpose of this option under the Inactivate Records Menu is to create a perpetual record in the Record Tracking system. A perpetual record is created to hold information you wish to retain when a record is retired.

CHARGE OUT/TRANSFER RETIREMENT PULL LISTS - Used to charge out record retirement pull lists. The records will be inactivated and transferred to the appropriate facility for retired records.

INACTIVATE/REACTIVATE RECORDS - Used to render a record unavailable/available. Inactivation of a record makes it unavailable to other users to request, charge-out, check-in, re-charge, etc.

PULL LIST FUNCTIONS MENU - See the Pull List Functions Menu Section.

Inactivate Records Menu
Generate Record Retirement Pull Lists

The Generate Record Retirement Pull Lists option is used to create record retirement pull lists. These pull lists are generated by selecting a range of terminal digits or by file number. Limiting the range by terminal digit is used to allow more manageable lists to be produced with the initial implementation. Later the job can be tasked to run periodically at a convenient interval.

A Record Retirement Profile is compiled and displayed, and you are given the opportunity to enter or edit the "Record Type Retirement Parameters" and the "Overall Retirement Parameters."

The OK TO RETIRE RECORDS? field must be set to YES in the record type parameters in order for the selected record type to be included on the pull list. No list is generated until the same field is set to YES in the overall parameters.

The pull list is generated by scanning the movements of records. If there has been no movements within the record retirement window (number of days entered in the RETIRE RECORD CUTOFF field) and the record does not have a REASON NOT TO RETIRE field set, a request for the record will be added to a record retirement pull list.

The pull list names are created from the current location of the record and the first day of the next month; or, if there is no current location, the home location and the first day of the next month. If there is no current location or home location, a pull list is created with the name "unknown". The date is used only to combine lists and has no other significance.

Inactivate Records Menu
Generate Record Retirement Pull Lists

Example


```
     ...compiling retirement profile
Record Tracking Retirement Profile            JUL  1,1991  16:14    PAGE 1
                                   OK        RETIRE
                                   TO        RECORD
                                   RETIRE    CUTOFF
NAME                               RECORDS?  (days)
------------------------------------------------------------------------------


     Application: MEDICAL ADMINISTRATION
ADMINISTRATIVE FOLDER              YES        1095
MEDICAL RECORD                     YES        1095


Record Type Retirement Parameters:
----------------------------------
Select RECORD TYPE: <RET>

Overall Retirement Parameters:
------------------------------
OK TO RETIRE RECORDS?: YES// <RET>

  Is it ok to continue? NO// YES  YES

Use terminal digit scan? YES// <RET>

 'Record Retirement Pull lists' will be generated using
     terminal digits to select a range of Records

Select a Terminal Digit or range:  (0-99): 1// 1-10


DEVICE: HOME// RET  LAT    RIGHT MARGIN: 80//


 Generating Record Retirement Pull List(s) [MEDICAL  ADMINISTRATION]

     310 Records Checked      0 Inactive Records      10  tdigits
```

Below is an example of the output if you send it to a printer. In an actual output, ALL records checked would be displayed in increments of 10.

```
 Generating Record Retirement Pull List(s) [MEDICAL ADMINISTRATION]

     10 Records Checked     0 Inactive Records     01 tdigits
     20 Records Checked     0 Inactive Records     01 tdigits
     30 Records Checked     0 Inactive Records     02 tdigits
     40 Records Checked     0 Inactive Records     03 tdigits
```

Inactivate Records Menu
Print Record Retirement Pull List

This option works much the same as the Print Pull List(s) option under the Pull List Functions Menu; however, only record retirement pull lists are printed. A pull list number is automatically assigned to every pull list created. Record retirement pull lists are used to find records to be retired and transferred to a record archive center, and as a guide for creating the perpetual record that is retained from the retired records.

Pull lists will generally be sorted by terminal digit or name. Other sorts are available but don't have much function for record retirement pull lists.

Pull lists may be printed to include all requests, a short non-fillable list, a detailed non-fillable list or only updates to the list. Updates are requests that were added after the entire pull list was last printed. If you chose to sort by clinic name - appointment type, you can only print to include all appointments or a short non-fillable list.

The pull list status (REQUESTED, CHARGED, CANCELLED) will only appear on clinic pull lists that are sorted by other than terminal digit. The status of a pull list may be REQUESTED even though the status of each request on that list is CHARGED. This may occur if the requests were filled through the Fill a Request option of the Request Records Menu. The status of the pull list will not change from REQUESTED to CHARGED or CANCELLED until the Charge Out Pull List Records or Entire Pull List Cancellation options are utilized.

Record borrowers may wish to use this option to view charged out pull lists to determine which requests were not fillable.

Inactivate Records Menu
Print Record Retirement Pull List

Example

```
Institution: ALBANY

Select a 'RR' Record Retirement Pull List: 216  JUNE RETIREMENT LIST
[07/01/91]
         07-01-91        CENTRAL FILE ROOM        REQUESTED

How do you want list sorted? Terminal Digits//   Clinic Name

Select type of list? All//   <RET>

DEVICE: AB78//  <RET>      HALLWAY PRINTER      RIGHT MARGIN: 132//   <RET>

DO YOU WANT YOUR OUTPUT QUEUED? NO// <RET>  (NO)

Requested Start Time: NOW// <RET> (AUG 26, 1991@08:38:39)
REQUEST QUEUED!
```

```
Record Pull List - MEDICAL ADMINISTRATION                PAGE   : 1
[Institution : ALBANY]                          Run Date: AUG 26, 1991  08:38
[Sorted by: Clinic and Terminal Digits]         Requested Date: JUL  1, 1991

Name                                                              Other Req
  SSN       Type  Request# Status    Requestor      Time Current Location  for Record
--------------------------------------------------------------------------------------
 [Record Request Pull List, #216 JUNE RETIREMENT LIST [07/01/91]]  [Pull List Status: REQUESTED]

MOORE,TOM   MED1     123  REQUESTED  CENTRAL FILE ROOM      CENTRAL FILE ROOM
 222233311
--------------------------------------------------------------------------------------
GARY,JOHN   MED1     135  REQUESTED  CENTRAL FILE ROOM      CENTRAL FILE ROOM
 112337340
--------------------------------------------------------------------------------------
IBOLD,DOUG  MED1     119  REQUESTED  CENTRAL FILE ROOM      CENTRAL FI LE ROOM
 222338667
--------------------------------------------------------------------------------------
CRANE,ANN   MED1     208  REQUESTED  CENTRAL FILE ROOM      CENTRAL FILE ROOM
 333229999
```

Inactivate Records Menu
Designate Retirement Requests as 'Not Fillable"

This option is used to designate requests on record retirement pull lists as not fillable (for records you do not wish to retire). Requests with a status of NOT FILLABLE may also be changed to REQUESTED through this option.

Requests designated as NOT FILLABLE will still appear on the Pending Request List, the Requests Pending for Borrowers List, and will also still appear as pending requests under the Request a Record option.

When selection is made by entering a patient's name, the system displays a patient profile and lists the patient's requestable records in that application (MAS or Radiology). After the record is selected, a request profile will be displayed for that record listing the requests which may be chosen. The user may designate a single request, multiple requests or a range of requests for each patient selected.

If the request is selected by entering the request number or by wanding the request barcode label, only the data associated with that particular request will be displayed.

Example

```
Select Request:  MANETTI,LAWRENCE         3-23-47      334556778
Searching for a PATIENT           3-23-47      334556778

Do you want the PATIENT 'MANETTI,LAWRENCE' as your answer? Yes//  <RET>
```

Inactivate Records Menu
Designate Retirement Requests as 'Not Fillable"

```
                        **** RADIOLOGY Profile ****
================================================================================
Name      : MANETTI,LAWRENCE  (334-55-6778)                        Page: 1
Birth Date: MAR 23, 1947                       Run Date: DEC 14, 1987@09:06
================================================================================

     Record Type     Vol    Current Borrower     Date Charged       Phone/Roo m#
     -----------     ---    ----------------     ------------       -----------
1  MASTER FOLDER     V1     MAIN FILE ROOM       MAR 17, 1987@13:23    444/609B
     --------------------------------------------------------------------------
2  CHEST FILMS       V1     MAIN FILE ROOM       JUN 29, 1987@15:12    444/609B


Select MANETTI,LAWRENCE's Record from List:   1



              **** Request Profile for MASTER FOLDER Vol: 1 ****
========================================================= ======================
Name      : MANETTI,LAWRENCE  (334-55-6778)                        Page: 1
Birth Date: MAR 23, 1947                       Run Date: DEC 14, 198@ 09:06
--------------------------------------------------------- ----------------------
Current   : MAIN FILE ROOM        Phone: 444          |Home : MAIN FILE ROOM
Since...  : MAR 17, 1987@ 13:23   Location: 609B       |Phone: 444
========================================================= ======================
                                                     [* pull list request]
    Record    Requestor          Date Needed       Phone/Room#       Request#
    ------    ---------          -----------       -----------       --------
1  MF1       BAILEY,CHARLOTTE    DEC 16, 1987      707/SUITE 235           33
================================================================================
Current status of request is 'REQUESTED'.

Do you want to change status to 'NOT FILLABLE' ? Yes//   <RET>
================================================================================
```

Inactivate Records Menu
Delete a Record

The Delete a Record option is used to delete a record. Records are deleted when volumes are combined or when the actual corresponding record does not exist. If a record cannot be located or should not be retired, the request should be made "not-fillable" through the Designate Retirement Requests as 'Not Fillable' option.

The system only allows deletion of most recent volumes of a record set; therefore, you will not be able to delete Volume 2 of a 6 volume set. Record entry may be made either by wanding the barcode label or entering the patient's name. Prior to deleting the record, you will be given the opportunity to move requests to the next lower volume number of the record type being deleted.

When a record is deleted, all associated requests for the record, missing record log entries and movement history log entries are also deleted. A MailMan message will be generated advising that the record has been deleted. This message goes to the same mail group that receives messages on missing/found records.

Example

```
Select Record: DILLON,MICHAEL
Searching for a PATIENT        06-01-51     123498760        SC VETERAN

Do you want the PATIENT 'DILLON,MICHAEL' as your answer? Yes//  <RET>


                 **** MEDICAL ADMINISTRATION Profile ****
==============================================================================
Name      : DILLON,MICHAEL  (123-49-8760)              Page: 1
Birth Date: JUN  1, 1951                   Run Date: JUN 11, 1991@08:02
==============================================================================

   Record Type       Vol  Current Borrower   Date Charged       Phone/Room #
   -----------       ---  ----------------   ------------       ------------
1  MEDICAL RECORD    V2   CENTRAL FILE ROOM  MAY 30, 1991@11:08  283/133
2  MEDICAL RECORD    V1   CENTRAL FILE ROOM  MAY 30, 1991@11:08  283/133


------------------------------------------------------------------------------
2  ADMINISTRATIVE F  V1   MARTIN,DONALD      SEP 28, 1989@14:27  307/301
   *** INACTIVE RECORD ***

Select DILLON,MICHAEL's Record from List: 1

Pending Requests can be transferred to Record/Volume ,1
      Transfer Requests to Volume '1' ? No//  YES
```

Inactivate Records Menu
Delete a Record

Record Chosen: DILLON,MICHAEL's MEDICAL RECORD [Volume: 1]

Deletion of this record will also cause the following to be deleted:
            - any requests for the record
            - any missing record log entries
            - all movement history log entries

Are you sure you want to delete this record? No// YES
Deletion process beginning...
            ...deletion complete

Inactivate Records Menu
Create a Label/Record/Volume

The Create a Label/Record/Volume option may be used to create all record types; however, the purpose of this option under the Inactivate Records Menu is to create a perpetual record in the Record Tracking system. This documentation addresses only perpetual records.

A perpetual record is created to hold information you wish to retain when a record is retired. Multiple volumes would not usually be allowed for this record type. This would be defined through your site's parameters. A record identifier number will be assigned for each record created.

This option may also be used to print existing barcode labels.

If your response was YES to the "Do you want to use the file room's default devices? No//" prompt upon entering the Record Tracking software and default printers were defined for the file room you selected, labels you print through this option will print to those default printers. If you answered NO or if no printers were defined, you may be prompted to select a device.

Example

```
Select PATIENT: SULLIVAN,TOM
Searching for a PATIENT                    01-23-44        224244242

Do you want the PATIENT 'SULLIVAN,TOM' as your answer? Yes// <RET>
```

Inactivate Records Menu
Create a Label/Record/Volume

```
                    **** MEDICAL ADMINISTRATION Profile ****
===========================================================================
Name      : SULLIVAN,TOM (224-24-4242)              Page: 1
Birth Date: JAN 23, 1944               Run Date: JUN 22, 1987  11:17
===========================================================================

   Record Type      Vol  Current Borrower  Date Charged      Phone/Room #
   -----------      ---  ----------------  ------------      ------------
1  MEDICAL RECORD   V1   7A(NHCU)          MAY 22, 1987  10:13
                         (FRANK MARVIN)                     (500/285H)
---------------------------------------------------------------------------
2  ADMINISTRATIVE F V1   MAS FILE ROOM     MAY 12, 1987  10:42 472-4307/SUITE

Select Labels from List: <RET>

Do you wish to create a new record or volume? No// Yes

Select NEW Record Type: PERPETUAL RECORD

PERPETUAL RECORD Creation:
-------------------------
HOME LOCATION: MAS FILE ROOM// <RET>
CURRENT BORROWER/FILE ROOM: MAS FILE ROOM// <RET>
  ...'PERPETUAL RECORD          VOL: 1' created (#430)
  ...label for record #430 has been queued to print on device A143

Select PATIENT: <RET>
```

Inactivate Records Menu
Charge Out/Transfer Retirement Pull Lists

This option is used to charge out record retirement pull lists. The records will be inactivated and transferred to the appropriate facility for retired records. You will first be given the opportunity to designate any request that you do not wish to charge out as NOT FILLABLE.

You may select a borrower (from your BORROWERS/FILE AREA file) to which you wish the record to be inactivated. The record will be inactivated with a movement type of TRANSFER RETIRE to the selected borrower. In addition, you may create a perpetual record from the pull list. A default borrower and perpetual record type may be defined through the Record Retirement Parameters in the Application Set-up option of the System Definition Menu.

This option may be used to change the status of requests from NOT FILLABLE to REQUESTED.

This option works the same as the Charge Out Pull List Records option of the Pull List Functions Menu. You may see prompts such as "Do you want to charge out records to a holding area? No//" which may not apply to retirement procedures.

Example

```
Do you wish to first designate some requests as 'not fillable'? No//   YES

Select Request:  210    BAILEY,CHRIS  REC#: 606  REQ#: 201
    Requestor:  CORRESPONDENCE GP        Date Needed:  JAN 22, 1988   18:15
                                                Type:  MEDICAL RECORD (V1)
           SSN:  100-00-9000              Date of Birth:  DEC 12, 1954
    Location:  MAS FILE ROOM                 Phone/Room:  444/Suite 222
-------------------------------------------------- -------------------------------
================================================================================
Current status of request is 'REQUESTED'.

Do you want to change status to 'NOT FILLABLE' ? Yes//   <RET>

Select Request:  <RET>

Institution: ALBANY,NY

Select a 'RR' Record Retirement Pull List: ALL CLINIC LISTS//   216   JUNE
RETIREMENT LIST [07/01/91]      07-01-91    CENTRAL FILE ROOM        CHARGED

Do you want to charge out records to a holding area? No//   <RET>

Select Record Retirement Borrower: FEDERAL RECORDS CENTER// <RET>    MEDICAL
ADMINISTRATION
```

Inactivate Records Menu
Charge Out/Transfer Retirement Pull Lists


```
Do you want to create 'TRANSFERED RECORD' records from Pull list? Yes//  <RET>

Enter the Record Center's accession number for these records: 234

Are you sure you want to 'CHARGE OUT' these records? No//   Yes
DEVICE: D543//  C555    OUTPATIENT PRINTER      RIGHT MARGIN: 132//   <RET>
DO YOU WANT YOUR OUTPUT QUEUED? NO// <YES> (YES)

Requested Start Time: NOW//   <RET>   (JUL 01, 1991@13:42:30)
REQUEST QUEUED!
```


The following is a sample output. When actually printed, a record will be created
for each patient on the pull list.


```
PULL LIST CHARGE-OUT LOG                      RUN DATE: SEP 16, 1991@18:29
------------------------------------------------------------------------------

   ...'RR MAIN FILE ROOM [10/01/91]' pull list has been charged out.

Creating `PERPETUAL FOLDER' records from RR Pull lists charged out


   ...'PERPETUAL FOLDER          VOL: 1' created (#11962)
   ...'PERPETUAL FOLDER          VOL: 1' created (#11963)
   ...'PERPETUAL FOLDER          VOL: 1' created (#11964)

Total 'PERPETUAL RECORD' records created = 3
```

**Inactivate Records Menu
Inactivate/Reactivate Records**

The Inactivate/Reactivate Records option is used to render a record unavailable/ available for transaction within the Record Tracking system. It may be used when records are retired, or perhaps in those instances when it is necessary for a borrower to retain a record for an extended period of time (i.e., for research purposes). Such a record will not appear on the Overdue Records List.

Inactivation of a record makes it unavailable to other users to request, charge-out, check-in, re-charge, etc. It will, however, appear on the Record Inquiry option of the Record Information Menu as INACTIVE.

Records may be inactivated as well as reactivated through this option. If you choose to inactivate the record, you will be prompted for a borrower to which the record should be inactivated. Your entry at this prompt may be a borrower who will be retaining the record for an extended period or your file room.

If you are retiring the record and wish to transfer it to the appropriate Record Processing Center, use the Transfer Records option of the Transaction Menu.

When a record is reactivated, it is automatically charged to the location associated with the user performing the reactivation; usually, its home file room.

Following selection of movement type and borrower (if applicable), you will be prompted to select the record. The system will only allow you to select a record appropriate to the movement type selected. In other words, you will not be permitted to inactivate an already inactive record. If record selection is made by entering the patient's name, only those records appropriate to the movement type selected will be displayed on the patient's Short Record Inquiry.

Multiple records may be entered during a session. Dependent upon the number entered and your site's parameters, they will either be inactivated/reactivated upon exiting the option or queued for action later.

Inactivate Records Menu
Inactivate/Reactivate Records

Example

```
Select Movement Type:  inACTIVATE RECORD          MEDICAL ADMINISTRATION


================================================================================
[INACTIVATE RECORD OPTION]
Select Borrower:  RPC         RPC ST. LOUIS
        ...OK? YES// <RET>     (YES)        RECORD PROCESSING CENTER
**** MEDICAL ADMINISTRATION Folders Currently Charged to Borrower ****
================================================================================
Borrower    : RPC                                   Page: 1
Phone/Location:                              Run Date: JUL  1, 1991@10:40
================================================================================

   Record Type    Vol     PATIENT                Charged Since...  Overdue
   -----------    ---   -------------------------  ----------------   ----

   No 'MEDICAL ADMINISTRATION' records charged to this borrower.

Update Borrower Information:
---------------------------
PHONE #: 518-462-3047
LOCATION/ROOM#: 121B
---------------------------


Select Record: CARNEGIE,MICHAEL
Searching for a PATIENT              02-02-22    333-22-4444     SC VETERAN

Do you want the PATIENT 'CARNEGIE,MICHAEL' as your answer? Yes// <RET>
                **** MEDICAL ADMINISTRATION Profile ****
================================================================================
Name   : CARNEGIE,MICHAEL  (333-22-4444)           Page: 1
Birth Date: FEB 02, 1922                       Run Date: JUL  1, 1991@10:43
================================================================= ==================

   Record Type      Vol  Current Borrower  Date Charged      Phone/Room #
   -----------      ---  ----------------  ------------      ------------
1  MEDICAL RECORD   V2   CENTRAL FILE ROOM  JUN 21, 1991@11:11  283 -7283/133
2  MEDICAL RECORD   V1   CENTRAL FILE ROOM  JUN 21, 1991@09:33  283 -7283/133
--------------------------------------------------------------------------
3  ADMINISTRATIVE F V1   CENTRAL FILE ROOM  JUN 19, 1991@15:04  283 -7283/133
--------------------------------------------------------------------------
4  PERPETUAL        V1   CENTRAL FILE ROOM  JUN 20, 1991@10:26  283 -7283/133

Select CARNEGIE,MICHAEL's Records from List: 4


Would you like to print a barcode label? No// <RET>

   ...added to list to be inactivated

Select Record: <RET>

1 Selected record will now be inactivated....
   1 ...record has been inactivated to 'RPC'.
```

Inactivate Records Menu
Pull List Functions Menu

Documentation for these options may be found in the Pull List Functions Menu Section of Part I of the Record Tracking User Manual.

Computer Site Manager's Menu

Prior to defining overall site parameters for Record Tracking, be sure all devices to be associated with Record Tracking are defined in your DEVICE file (#3.5). Determine who needs to receive bulletins regarding missing records and build a MISSING RECORD mail group. Prior to assigning menus to users, the DIVISION field of the NEW PERSON file (#200) must be defined for each user of Record Tracking. If you need to define a second request printer, see the Overview of the Initialization submenu contained in this menu for instruction.

Below is a brief description of the options contained in this menu.

ADMITTING AREA SET-UP (SITE MGR) - Used to enter/update barcode printers and input devices for each admitting area defined.

APPLICATION SET-UP (SITE MGR) - Used to customize the appearance of certain prompts and headers and associate them with the correct file for your application.

FILE ROOM SET-UP (SITE MGR) - Used to define printers, input devices and security keys for each file room.

FILE ROOM/REMOTE SET-UP (SITE MGR) - Used to define the domains, remote printers, mail groups and mail routing symbols for transmission of remote record requests or notice of transfers to other VA medical centers.

IMAGING AREA SET-UP (SITE MGR) - Used to enter/update barcode printers and input devices for each imaging area defined.

INITIALIZATION MENU - Contains all the options used by the site manager to set up the system prior to going live.

PURGE DATE - Used to purge pull list, requests, and movement logs data.

RE-COMPILE TEMPLATES - Allows Record Tracking templates to be recompiled on each CPU after running an init.

RECORD TRACKING SYSTEM OVERALL PARAMETERS - Used to define parameters used by all applications as well as some specific to the Radiology and MAS applications.

Computer Site Manager's Menu
Admitting Area Set-up (Site Mgr)

This option is used to enter/update barcode printers and input devices for each admitting area defined.

Field Descriptions

Select Admitting Area	Enter the name of the admitting area being defined/updated. This is a multiple field. For each entry in this field, the following two fields will be prompted, returning you to this prompt upon completion. You should enter and define parameters for each admitting area to be associated with your application.
RECORD BARCODE PRINTER	Enter the printer from your DEVICE file which will be used to print record barcode labels for this admitting area.
Select INPUT DEVICES	Enter the input devices which will be used to input data from this admitting area. This is a multiple field. Entries at this prompt are optional; however, it is recommended that devices be entered to prevent routine users in these areas from being prompted for their admitting area each time they sign into Record Tracking.

Computer Site Manager's Menu
Application Set-up (Site Mgr)

This option is used to define security key parameters, specify which mail group is to receive bulletins of missing records, customize the appearance of certain prompts and headers and associate them with the correct file for your application.

Field Descriptions

{MAS/RAD} Application Parameter Set-Up (Site Mgr)

APPLICATION | The current application will appear as a default. You may rename it at this prompt, if you wish. You may not change to a different application from this prompt.

Select SYNONYM | Enter a synonym (3-30 characters) by which this application may be known. For example, MAS for Medical Administration Service.

SERVICE | Enter the service (from service list) which is associated with this application.

Entity Parameters

The Entity Parameters allow Record Tracking to be tailored around any application you chose. You may change the wording of application specific prompts to suit the needs of your application.

ENTITY SELECT PROMPT | This is used to enter the wording you wish to appear at entity select prompts. For example, the MAS application may wish to enter PATIENT; Radiology may wish to enter FILM. Thus "Select PATIENT" or "Select FILM" would appear at each entity prompt.

ENTITY DISPLAY HEADING | This is used to enter the wording you wish to appear on application specific headings. For example, MAS may wish CONSOLIDATED HEALTH RECORD to be displayed.

Computer Site Manager's Menu
Application Set-up (Site Mgr)

Select ENTITY FILE   Enter the name of the file in which the system
                            should search in accessing the entry at the entity
                            select prompt. For instance, if PATIENT was entered
                            at the entity select prompt, more than likely PATIENT
                            would be entered at this prompt to associate entries
                            with the PATIENT file.

Borrower Parameters

BORROWER SELECT   This field may also be used to change the wording
PROMPT   of the "Select Borrower" prompt. For example,
                            Radiology may wish to enter REVIEWER, thus "Select
                            REVIEWER" would be prompted.

Select BORROWER   Enter the file which is to be associated with the
FILE   entries made at borrower select prompts; i.e., ward,
                            institution, hospital location, new person. This is a
                            multiple field. You may enter more than one file to be
                            associated with the borrower select prompts. For each
                            entry, the following three fields will also be prompted,
                            returning you to this prompt upon completion.

ASK PHONE/ROOM   YES/NO   When this borrower is selected, should
                            users be prompted to update their phone/room?

ASK FOR   YES/NO   When borrowers are selected from this
ASSOCIATED   file should users be prompted to enter an
BORROWER   associated borrower? For instance, you may wish to
                            use this in the case of a ward being a borrower. You
                            may have users enter an individual's name as an
                            associated borrower.

SHOW CHARGED   YES/NO   When a borrower from this file is
RECORDS   selected, should the system display all records
                            currently charged to that borrower?

Computer Site Manager's Menu
Application Set-up (Site Mgr)

Miscellaneous Parameters

FILE ROOM
STAFF KEY

Enter the appropriate staff key associated
with this application. Choose from:
    RT MAS-FR-STAFF
    RT RAD-FR-STAFF

FILE ROOM
SUPERVISOR KEY

Enter the appropriate file room supervisor key
associated with this application. Choose from:
    RT MAS-FR-SUPERVISOR
    RT RAD-FR-SUPERVISOR

MISSING RECORD
MAIL GROUP

Enter the mail group which is to receive
bulletins of missing and deleted records.

CLINIC REQUESTS
MAIL GROUP

Enter the name of the mail group which
should receive the bulletin advising the Clinic
Initialization background job has run. This job may
be set to run daily through your Record Tracking
System Overall Parameters option to interface all
scheduled clinic appointments with record
requests/pull lists.

CANCELATION
BULLETIN

How you want the file room to be notified when
a record request is cancelled?
    0 - not notified
    1 - by bulletin to a mail group
    2 - by printing bulletin on the file room's request printer
    3 - both 1 and 2

CANCELATION
MAIL GROUP

If cancellation bulletin was selected at previous
prompt, the name of the mail group to receive bulletin.

TERMINATED
BORROWERS

Yes/No   If set to YES and a user is terminated on
the system, the borrowing privileges of that user will
be revoked when the Clinic Request Initialization
Task runs at night.

Computer Site Manager's Menu
Application Set-up (Site Mgr)

CANCEL REQUESTS   Yes/No   If the previous parameter is set to YES
                         and this parameter is set to YES, all pending requests
                         for records by the terminated borrower will be
                         cancelled when the Clinic Request Initialization Task
                         runs at night.

Computer Site Manager's Menu
File Room Set-up (Site Mgr)

This option is used to define printers, input devices and security keys for each file room associated with the respective applications. Assigning devices by file room allows file rooms to be assigned on entry to Record Tracking menus without requiring user selection.

Field Descriptions

Select FILE ROOM	Enter the name of the file room for which you are defining/updating parameters. This is a multiple field. For each entry made, the following fields will also be asked, returning you to this prompt upon completion. You should enter each file room previously defined.

Printers Assigned to this File Room

RECORD BARCODE PRINTER	Enter the printer from your DEVICE file on which record barcodes are to be printed for this file room.
REQUEST NOTICE PRINTER	Enter the printer from your DEVICE file on which request notices should be printed. If more than one device is required, see the overview of this section.
MANAGEMENT REPORT PRINTER	Enter the printer from your DEVICE file on which management reports should be printed for this file room.

Computer Site Manager's Menu
File Room Set-up (Site Mgr)

CRTs Assigned to this File Room

Select   Enter the input devices from your DEVICE file
INPUT DEVICES   which will be inputting data from this file room. Input
                                devices allow the system to determine the file room
                                when entering a record tracking option.

                                This function includes virtual devices; i.e.,
                                DECservers. Every device must have an entry in the
                                DEVICE file and the entry must be unique if there are
                                multiple file rooms. In the case where there is only
                                one file room, the LTA generic device entry may be
                                used.

Security Key Needed to Select File Room

WHICH SECURITY   This field is used to secure a file room so that only
KEY IS NEEDED   holders of the designated security key may enter
                                this file room as a borrower of a record. Choose from:
                                    RT MAS-FR-STAFF
                                    RT RAD-FR-STAFF

Computer Site Manager's Menu
File Room/Remote Set-up (Site Mgr)

This option is used to define the domains, remote printers, mail groups and mail routing symbols for transmission of remote record requests or notice of transfers to other VA medical centers. When a request for records from another VAMC is generated, a bulletin will be sent by network mail to that site using the domain, request notice printer, and/or remote mail group for that site. If both the mail group and printer are defined, the bulletin will be sent to both. If neither are defined, the bulletin will not be sent to the remote site; however, it will be delivered locally to the user making the request.

A profile of known entries is displayed on entering the option for reference.

Field Descriptions

Remote Institution Parameters

Select INSTITUTION	Enter the name of the remote institution for which you are defining/updating parameters. For each entry made, the following fields will also be asked, returning you to this prompt upon completion.
DOMAIN	Enter the valid DOMAIN file entry for the remote institution.
REQUEST NOTICE PRINTER	Enter the printer from the remote site's DEVICE file where the system will print requests for records.
REMOTE MAIL GROUP	Enter the name of the mail group (1-30 characters) at the remote site which will receive the record request bulletin.
MAIL ROUTING SYMBOL	Enter the standard mail routing symbol. It is not used by network mail but is included for use with non-electronic mail.

Computer Site Manager's Menu
Imaging Area Set-up (Site Mgr)

This option is used to enter/update barcode printers and input devices for each imaging area defined.

Field Descriptions

Select Reception/   Enter the name of the reception/viewing area being
Viewing Rack Area   defined/updated. This is a multiple field. For each
                                entry in this field, the following two fields will be
                                prompted, returning you to this prompt upon
                                completion. You should enter and define parameters
                                for each imaging area to be associated with your
                                application.

RECORD   Enter the printer from your DEVICE file which
BARCODE   will be used to print record barcode labels for
PRINTER   this imaging area.

Select INPUT   Enter the input devices which will be used to
DEVICES   input data from this imaging area. This is a multiple
                                field. Entries at this prompt are optional; however, it
                                is recommended that devices be entered to prevent
                                routine users in these areas from being prompted for
                                their imaging area each time they sign into Record
                                Tracking.

Computer Site Manager's Menu
Initialization Menu

The initialization of records and borrowers is a very important phase to the initial installation process of Record Tracking. Several things need to be considered prior to embarking on this phase.

Records Initialization/Printing of Barcode Labels

Do you wish to print barcode labels for your entire database all at once? All inactive patients will be included; expired patients will not.

Patients with multiple volumes will need to be identified and those additional volumes created in the system later with barcode labels printed. The labels generated by the initialization process should be placed on Volume <u>1</u> since this is the volume with which the system will associate those labels.

You should use high quality labels that are large enough to allow white space (about 1 inch) around the barcode itself. It is recommended you use 2 15/16" X 5" labels.

Placement of the labels on records jackets is important. To minimize the chances of labels peeling back, placement should be as close to the center of the jacket as possible.

Record Tracking allows two Request Notice Printers and/or two Record Barcode Printers to be set up for a file room. To implement this, create two devices with the same names, ending the device name with "RTHG1" and "RTHG2" in your DEVICE file. To implement both Request Notice and Request Barcode dual printers, you would use names such as "Request RTHG1" and "Request RTHG2" or "Label RTHG1" and "Label RTHG2". When this is implemented, the patients with even social security numbers will print on one printer and odd social security numbers will print on the other. Add the device "xxxRTHG1" to the file room's REQUEST NOTICE PRINTER or RECORD BARCODE PRINTER parameter field using the Computer Site Manager's Menu, File Room Set-up (Site Mgr) option.

Computer Site Manager's Menu
Initialization Menu

Borrower Initialization

During the borrower initialization process, all active clinics, wards and persons in the HOSPITAL LOCATION, WARD LOCATION, and NEW PERSON files will be initialized as borrowers. There may be other areas which you will want to also initialize. In order to do this, it will first be necessary to enter those areas into the appropriate file, assigning them a type of OTHER. Examples of such borrowers would be Correspondence Unit, Tumor Registry, Details Office, and Doctor's Reading Room.

Below is a listing of the characteristics used for some of the more common barcode printers.

DATASOUTH

In order to print barcodes with the DATASOUTH there are two functions that need to be set on the printer: l) function 2 set to 18 (the number of lines on the label) 2) function 70 set to 1 (enables barcode printing).

NAME: P-DATA SOUTH/220 BARCODE
FORM FEED: #
PAGE LENGTH: 18
BACK SPACE: $C(8)
DESCRIPTION: DS220 WITH BARCODE
BAR CODE OFF: *94,"G",!,?6,"*",X,"*"
BAR CODE ON: *94,"H08",*94,"BXA"

Computer Site Manager's Menu
Initialization Menu

MT290

The MT290 needs to have the barcode cartridge in place. Then program the printer
at the panel so: l) unsecure mode (yes) 2) compressed print (yes) 3) double pass
(no).

NAME: P-MT290 W/BARCODE
RIGHT MARGIN: 80
FORM FEED: #,*27,"[18t"
PAGE LENGTH: 18
BACK SPACE: $C(8)
DESCRIPTION: BARCODE FOR MT290
BAR CODE OFF: "*",!!,?5,$S($D(X):X,l:""),!
BAR CODE ON: *26,*32,"F5;001" *25,*20,"*"

FACIT

The FACIT is ready to use as is.

NAME: P-FACIT
RIGHT MARGIN: 80
FORM FEED: #,*27,"[18t"
PAGE LENGTH: 18
BACK SPACE: $C(8)
DESCRIPTION: P-FACIT/SLAVE
BAR CODE OFF: *12,!,?10,"*",X,"*",*12
BAR CODE ON: *27,*50,*50,*27,*53,*52,*26,*39,*79,"@"

Computer Site Manager's Menu
Initialization Menu
Barcode Labels for All Patients

The Barcode Labels for All Patient option is used to print record barcode labels for all patients in your database. The process will also create records for those patients added to the system after record initialization has taken place; however, it should not be used without record initialization having been completed.

At multi-divisional facilities, you may specify for which division you want the labels to print. Labels may be printed in alphabetical or terminal digit order. Terminal digit order allows you to print a batch at a time whereas the alphabetical sort will perform the entire run all at once. In order to run by terminal digit, the Terminal Digit Sort Global must have been run.

In terminal digit sorting, digits of the SSN are grouped as follows:

```
REGIONAL       TERTIARY       SECONDARY      TERMINAL
CODE           DIGIT          DIGIT          DIGIT

435            15             00             23
```

The system works from right to left, looking at the terminal digit, the secondary digit, the tertiary digit, and lastly the regional code. Thus, 000 00 0123 would be printed before 000 00 0823. All patients with social security numbers in the PATIENT/RADIOLOGY PATIENT files would be included in this run with the exception of expired patients. It will take approximately 1 hour for every 1,000 patients.

Computer Site Manager's Menu
Initialization Menu
Borrower Initialization

This option initializes all active clinics, wards and providers in your LOCATION and PROVIDER files, placing them in the BORROWERS/FILE AREAS file.

IT IS IMPORTANT TO NOTE THAT ALL BORROWERS WILL STILL NEED TO BE ENTERED BY THE APPLICATION COORDINATOR THROUGH THE BORROWER SET-UP OPTION OF THE SYSTEM DEFINITION MENU.

Example

```
Initialize active 'CLINICS' as MEDICAL ADMINISTRATION borrowers? No//  YES
..............................
  .................................................
  .................................................
  .................................................
  ..............Done

Initialize active 'WARDS' as MEDICAL ADMINISTRATION borrowers? No//  YES
................................
  ............................Done

Initialize active 'PROVIDERS' as MEDICAL ADMINISTRATION borrowers? No//  YES

OK.  This may take awhile ....................Done
```

**Computer Site Manager's Menu
Initialization Menu
Clinic Request Initialization**

This option checks all clinic appointments and requests records/x-rays if required by the clinic set-up. The option is normally only used when your Automatic Clinic Initializer background job fails to run.

Example

```
**** Date Range Selection ****

  Beginning DATE/TIME  : T  (JUN  6, 1988)

  Ending    DATE/TIME  : T+5  (JUN 11, 1988)

DEVICE: HOME// <RET>       RIGHT MARGIN: 80// <RET>


Clinic Record Requests Initialization Program

Start      Time:  JUN  6, 1988  11:07 ...........

Number of requests made or reaffirmed:     623

Finished Time:  JUN  6, 1988   11:07
```

Computer Site Manager's Menu
Initialization Menu
Compile Terminal Digit Sort Global

This option is a preliminary step prior to printing barcode labels. It is necessary if you plan to print them in terminal digit order, as it sets up the mechanism by which they will be sorted. It will take approximately 1 1/2 hours for 44,000 entries. This option can also be used to select a range of records for generating record retirement pull lists.

Example

Example 1 - Initial utilization of this option

```
Terminal Digit Sort Global Compilation:

Do you wish to queue a job that will compile global? No//  YES

Requested Start Time: NOW//  <RET>  (JUN 10,1991@09:45)
Request Queued!
```


Example 2 - Subsequent utilization of this option

```
Terminal Digit Sort Global Compilation:

The ^UTILITY ("RTDPTSORT") global already exists.
        Compilation started:  AUG  2, 1990@13:11
                   finished:  AUG  2, 1990@13:13

Do you wish to queue a job that will compile global? No// YES

Requested Start Time: NOW//  <RET>  (JUN 10,1991@09:45)
Request Queued!
```

Computer Site Manager's Menu
Initialization Menu
Delete Terminal Digit Sort Global

After initial printing, the Terminal Digit Sort global is no longer used by the system and may be deleted through this option.

Example

```
Are you sure you want to delete the ^UTILITY("RTDPTSORT") global? No//  Yes
   ...deleted
```

Computer Site Manager's Menu
Initialization Menu
Initialize Records (NO LABELS)

This option is used to create the records which will be tracked by Record Tracking. Using patients in the PATIENT file or RADIOLOGY PATIENT file (depending upon the application for which you are initializing records) as a base, it will create records according to specifications made in your Application Set-up. One volume of each default record (Volume 1) and linked record (if defined) will be created for each patient in the appropriate file. Upon creation of these records, an entry is made in the RECORDS file (#190) and the RECORD MOVEMENT HISTORY file (#190.3). It will be necessary to identify those patients having multiple volumes and create those records, along with their barcode labels, at a later date. This option does not print barcode labels.

Should it be necessary to restart this job, you may do so by accepting the default at the initial prompt ("Start at DFN") as the system will store the DFN corresponding to the last patient record created. You may wish to queue this job to run during off hours.

Example

```
This option will use the patients in the PATIENT file as a base to create the
necessary folder entries in the RECORDS file.  <This option does not create
barcode labels.>

Start at DFN: 1// <RET>


     For each patient, the following records will be
     created:

     MEDICAL
     ADMINISTRATIVE

Select Type of Record: <RET>

Do you want to create these records?  No// YES
DEVICE: HOME// <RET>      RIGHT MARGIN: 80// <RET>
```

Computer Site Manager's Menu
Initialization Menu
Initialize Records (NO LABELS)


```
MAS Patient Folder Creation:

     START TIME: OCT 7, 1987   14:55

Log
---
[TOTAL PATIENTS PROCESSED        :  700]
[TOTAL NUMBER OF RECORDS CREATED: 1400]
[TOTAL RECORD LABELS CREATED     :    0]

     STOP TIME: OCT 7, 1987   16:55
```

Computer Site Manager's Menu
Initialization Menu
Inpatient Barcode Labels Only

The Inpatient Barcode Labels Only option is used to print record barcode labels for inpatients in your database. The process will also create records for those patients added to the system after record initialization has taken place; however, it should not be used without record initialization having been completed.

At multi-divisional facilities, you may specify for which division you want the labels to print. Labels may be printed in alphabetical or terminal digit order. Terminal digit order allows you to print a batch at a time whereas the alphabetical sort will perform the entire run all at once. In order to run BY terminal digit, the Terminal Digit Sort Global must have been run.

In terminal digit sorting, digits of the SSN are grouped as follows:

REGIONAL CODE	TERTIARY DIGIT	SECONDARY DIGIT	TERMINAL DIGIT
435	15	00	23

The system works from right to left, looking at the terminal digit, the secondary digit, the tertiary digit, and lastly the regional code. Thus, 000 00 0123 would be printed before 000 00 0823. All patients with social security numbers in the PATIENT/RADIOLOGY PATIENT files would be included in this run with the exception of expired patients. It will take approximately 1 hour for every 1,000 patients.

**Computer Site Manager's Menu
Initialization Menu
Single Clinic Request Initialization**

The Single Clinic Request Initialization option checks all appointments for the selected clinic and requests records/x-rays if required by the clinic set-up. This option is similar to the Clinic Request Initialization option except that it is run for a specific clinic. You may wish to use this if you have a clinic now requiring records which previously did not.

Following is an example of what may appear on the screen when using this option. All user entries are underlined.

Example

```
Clinic Record Request Initialization

Select HOSPITAL LOCATION NAME:   FOOT CLINIC

 **** Date Range Selection ****

    Beginning DATE/TIME : T   (JUN 13, 1988)

    ENDING    DATE/TIME : T+5  (JUN 18, 1988)

DEVICE: HOME// <RET>


Clinic Record Requests Initialization Program

Start    Time:  JUN 13, 1988    15:33

Number of requests made or reaffirmed:  10

Finished Time: JUN 13, 1988     15:33
```

Computer Site Manager's Menu
Purge Data

This option is used to purge certain data specific to Record Tracking. It is recommended purges not be performed the first month Record Tracking is live. After that, regular purging should be done. How often you purge will depend upon the amount of available disk space as well as the amount of activity in Record Tracking. Purges should be run on the same CPU as the RT and RTV globals and not at the same time the Automatic Clinic Initialization background job is being run. You may schedule regular purging through the TaskMan if you wish.

Purges are done by record type, based on the specifications set up in the Type of Record Set-up option of the System Definition Menu. For each record type, the following purge parameters will be set:

OK TO PURGE DATA?
PULL LIST PURGE CUTOFF (days)
REQUEST PURGE CUTOFF (days)
PREVIOUS MOVEMENTS TO RETAIN

Upon entering this option a purge profile will be displayed, reflecting the purge parameters set up for each record type. You will be given the opportunity to edit these if you wish, then prompted for which data should be purged (pull list, requests, movement logs). The data specified for purging through the Overall Purge Parameters will only be purged for those record types for which the OK TO PURGE DATA field has been set to YES. You may purge all data for all record types, or specify certain record types and data to be purged.

Computer Site Manager's Menu
Purge Data

Example

```
... compiling purge profile


Record Tracking Purge Profile      JUN 13, 1988    14:07  PAGE 1
                                 OK    PULL LIST    REQUEST      #
                                 TO      PURGE       PURGE    PREVIOU S
                               PURGE    CUTOFF      CUTOFF    MOVEMENTS
NAME                           DATA?    (days)      (days)   TO RETAIN
------------------------------------------------------------------------

      Application:  MEDICAL ADMINISTRATION
ADMINISTRATIVE FOLDER           NO        45          45         10
CLAIMS FOLDER                   NO                                20
MEDICAL RECORD                  NO        45          45         10
PERPETUAL                       N0         5          90         10
TEST                           YES         5           1         10

      Application:  RADIOLOGY
BONE FILMS                      NO        89          89         18
CHEST FILMS                     NO        89          89         18
HEAD FILMS                      NO        89          89         89
MASTER FOLDER                  YES        90          90         90
OUTSIDE FOLDER                  NO        89          89         18
TEMPORARY EXAM FOLDER           NO        89          89         18
WET READING FOLDER              NO        89          89         18


Record Type Purge Parameters:
-----------------------------
Select RECORD TYPE: MEDICAL RECORD
OK TO PURGE DATA?: NO/ YES
PULL LIST PURGE CUTOFF (days): 45// <RET>
REQUEST PURGE CUTOFF (days): 45// <RET>
# PREVIOUS MOVEMENTS TO RETAIN: 10// <RET>

SELECT RECORD TYPE: <RET>

Overall Purge Parameters:
-------------------------
OK TO PURGE PULL LISTS?: NO// YES
OK TO PURGE REQUESTS?: NO// <RET>
OK TO PURGE MOVEMENTS LOGS?: NO// <RET>

Is it ok to continue? No// Yes
REQUESTED TIME TO RUN JOB: NOW// <RET>
REQUEST QUEUED!
```

Computer Site Manager's Menu
Re-Compile Templates

This option allows RT templates to be recompiled on each CPU after running an init. It will recompile the cross-reference templates in addition to the input and print templates used by FileMan. Input and print templates have the RTC* namespace. Cross-reference templates have the RTX* namespace and are as follows:

```
RECORDS FILE                  #190       RTXR*
REQUESTED RECORDS             #190.1     RTXQ*
RECORD MOVEMENT HISTORY       #190.3     RTXM*
PULL LIST                     #194.2     RTXP*
BORROWERS/FILE AREAS          #195.9     RTXB*
```

Example

```
Are you sure you want to re-compile the record tracking templates?  No// Yes
============================================ ============================
               Recompilation of 'INPUT' Templates
===========================================================================

---- RE-COMPILING THE 'RT CHANGE REQUEST STATUS' INPUT TEMPLATES

Compiling RT CHANGE REQUEST STATUS input template of File 190.1...
'RTCS' ROUTINE FILED

  ...'RT CHANGE REQUEST STATUS' has been re-compiled in the ^RTCS* routines.
===========================================================================
---- RE-COMPILING THE 'RT CHARGE' INUT TEMPLATES

Compiling RT CHARGE input template of File 190...
'RTCC' ROUTINE FILED.....
'RTCC2' ROUTINE FILED....
'RTCC3' ROUTINE FILED..
'RTCC4' ROUTINE FILED..
'RTCC5' ROUTINE FILED..
'RTCC1' ROUTINE FILED

    ...'RT CHARGE' has been re-compiled in the ^RTCC* routines
===========================================================================
---- RE-COMPILING THE 'RT MOVEMENT' INPUT TEMPLATES

Compiling RT MOVEMENT input template of File 190.3......
'RTCM' ROUTINE FILED...
'RTCM1' ROUTINE FILED.
'RTCM2' ROUTINE FILED
```

```
    ...'RT MOVEMENT' has been re-compiled in the ^RTCM* routines.
============================================================================
---- RE-COMPILING THE 'RT NEW RECORD' INPUT TEMPLATES

Compiling RT NEW RECORD input template of File 190...
'RTCR' ROUTINE FILED.....
'RTCR1' ROUTINE FILED....
'RTCR2' ROUTINE FILED.
'RTCR3' ROUTINE FILED

    ...'RT NEW RECORD' has been re-compiled in the ^RTCR* routines.
============================================================================
---- RE-COMPILING THE 'RT PULL LIST' INPUT TEMPLATES

Compiling RT PULL LIST input template of File 194.2....
'RTCP' ROUTINE FILED....
'RTCP1' ROUTINE FILED.....
'RTCP2' ROUTINE FILED...
'RTCP3' ROUTINE FILED

    ...'RT PULL LIST' has been re-compiled in the ^RTCP* routines.
============================================================================
---- RE-COMPILING THE 'RT REQUEST' INPUT TEMPLATES

Compiling RT REQUEST input template of File 190.1..
'RTCU' ROUTINE FILED....
'RTCU2' ROUTINE FILED....
'RTCU3' ROUTINE FILED......
'RTCU4' ROUTINE FILED..
'RTCU1' ROUTINE FILED

    ...'RT REQUEST' has been re-compiled in the ^RTCU* routines.
============================================================================

============================================================================
                 Recompilation of 'OUTPUT' Templates
============================================================================
---- RE-COMPILING THE 'RT HOME LOCATION' OUTPUT TEMPLATES

Compiling RT HOME LOCATION print template of File 190............
'RTCH' ROUTINE FILED......

...'RT HOME LOCATION' has been re-compiled in the ^RTCH* routines.
============================================================================
---- RE-COMPILING THE 'RT MISSING' OUTPUT TEMPLATES

Compiling RT MISSING print template of File 190.2................
'RTCL' ROUTINE FILED..........

    ...'RT MISSING' has been re-compiled in the ^RTCL* routines.
```

Computer Site Manager's Menu
Re-Compile Templates


```
===============================================================================
---- RE-COMPILING THE 'RT PENDING REQUESTS' OUTPUT TEMPLATES

Compiling RT PENDING REQUESTS print template of File 190.1..............
'RTCX' ROUTINE FILED......

   ...'RT PENDING REQUESTS' has been re-compiled in the ^RTCX* routines.
===============================================================================


===============================================================================
                 Recompilation of 'CROSS-REFERENCES'
===============================================================================
---- RE-COMPILING THE 'RTXR' CROSS-REFERENCE TEMPLATES

Compiling Cross-Reference routine............

...HMMM, LET ME PUT YOU ON 'HOLD' FOR A SECOND...

RTXR1 routine filed
RTXR2 routine filed
RTXR routine filed

   ...'RTXR' has been re-compiled in the RTXR* routines.


===============================================================================

---- RE-COMPILING THE 'RTXQ' CROSS-REFERENCE TEMPLATES

Compiling Cross-Reference routine............

...SORRY, LET ME PUT YOU ON 'HOLD' FOR A SECOND...

RTXQ1 routine filed
RTXQ2 routine filed
RTXQ routine filed

   ...'RTXQ' has been re-compiled in the RTXQ* routines.

============================================================= ========================

---- RE-COMPILING THE 'RTXM' CROSS-REFERENCE TEMPLATES

Compiling Cross-Reference routine............

...SORRY, JUST A MOMENT PLEASE...

RTXM1 routine filed
RTXM2 routine filed
RTXM routine filed

   ...'RTXM' has been re-compiled in the RTXM* routines.
```

Computer Site Manager's Menu
Re-Compile Templates

==

---- RE-COMPILING THE 'RTXP' CROSS-REFERENCE TEMPLATES

Compiling Cross-Reference routine............

...HMMM, THIS MAY TAKE A FEW MOMENTS...

RTXP1 routine filed
RTXP2 routine filed
RTXP routine filed

   ...'RTXP' has been re-compiled in the RTXP* routines.

==

---- RE-COMPILING THE 'RTXB' CROSS-REFERENCE TEMPLATES

Compiling Cross-Reference routine............

...SORRY, LET ME THINK ABOUT THAT A MOMENT...

RTXB1 routine filed
RTXB2 routine filed
RTXB3 routine filed
RTXB4 routine filed
RTXB5 routine filed
RTXB6 routine filed
RTXB7 routine filed
RTXB8 routine filed
RTXB routine filed

   ...'RTXB' has been re-compiled in the RTXB* routines.

Re-compiling the Clinic Setup Template, don't worry

Compiling SDB input template of File 44.....
'SDBT' ROUTINE FILED.........
'SDBTl' ROUTINE FILED......
'SDBT2' ROUTINE FILED.........
'SDBT3' ROUTINE FILED.....
'SDBT5' ROUTINE FILED.
'SDBT4' ROUTINE FILED.
'SDBT6' ROUTINE FILED...Done.

NOTE: Recompilation should be performed on ALL systems.

Computer Site Manager's Menu
Record Tracking System Overall Parameters

This option is the final step in the initialization process. An important aspect of this option is the interfacing of Record Tracking (Medical Administration and Radiology applications) with the Scheduling package, such that record requests are created for scheduled clinic appointments and placed on the appropriate pull list. This will be transparent to the user and may be accomplished in one of two ways. Record requests may either be created continually in the background as clinic appointments are scheduled, or you may schedule a background job to run once each evening. Scheduling a background job to run once each evening is the preferred method. This is done through TaskMan as well as via this option by setting the parameter BATCH RECORD/XRAY REQUESTS to YES. At the next prompt, BATCH REQUESTS CUTOFF (days), you will specify the number of days into the future the system should look at scheduled appointments and make corresponding record requests. This parameter should be set to a time span which will cover the lead time the file room will need to pull records. Each time this job runs, a MailMan message is generated to the mail group specified in the CLINIC REQUESTS MAIL GROUP field of the Application Set-up option, Computer Site Manager Menu. If this message is not received, the job should be run manually through the Clinic Request Initialization option of the Computer Site Manager Menu. The final step of this process is setting the INTERFACE STATUS to YES for each application.

Field Descriptions

Parameters Used by All Applications

QUEUE THRESHOLD	This applies to records selected for transaction through options on the Transaction Menu; i.e., charge-out, check-in, etc. You should enter the number of records which must be selected for transaction in order for that transaction to be queued to run, rather than accomplished at time of entry thus possibly causing a system slowdown. Enter a number between 0 and 9999. You may wish to enter a low number to reduce slow down of the system when large quantities of records are selected for transaction. Two is recommended.

Computer Site Manager's Menu
Record Tracking System Overall Parameters

OPERATING   Enter the operating condition. Choose from:
CONDITIONS
                        'N'ORMAL
                        'E'MERGENCY (NORMAL COMPUTER DOWN) (if
                        set to "E" user will be prompted to enter a device each
                        time one is needed)

                        Under normal conditions, the system uses the
                        parameters set up in Files #195.1, #195.2, and #195.9
                        to determine which input and printer devices to use.
                        Under emergency conditions, the system ignores all
                        the location parameters set up and prompts the user
                        for this information.

NULL QUEUING   This field applies only when you will NOT be
DEVICE   scheduling a background job to run each evening
                        to create record requests for scheduled clinic
                        appointments. (It should be left blank if you will be
                        scheduling a background job to run each night.) This
                        field allows you to define a queuing device (usually a
                        port) where queued jobs should be sent.

BATCH RECORD/   YES/NO   Do you wish all record/x-ray requests to
XRAY REQUESTS   be processed immediately or batched? YES to batch
                        requests, NO to process immediately. If YES, the next
                        prompt is used to specify the number of future days
                        into which the system should look when gathering
                        such record requests.

Computer Site Manager's Menu
Record Tracking System Overall Parameters

BATCH REQUESTS   This field operates in conjunction with a scheduled
CUTOFF (days)   job which will run each night where Record Tracking
                        looks at the Scheduling module to see what appoint-
                        ments have been scheduled and makes the appro-
                        priate record requests and places them on the
                        appropriate pull lists. At this prompt, you should
                        enter the number of days into the future the system
                        should look (1-9). Automatic default is 5. An
                        associated MailMan message will be generated
                        advising that this job has run. If you do not receive
                        this message, you should run the Clinic Request
                        Initialization option on the Computer Site Manager
                        Menu.

LABEL PRINTER   This field has been provided to allow the label
COOLER   printer to hang for a specified amount of time every
                        100 patients. You should enter the number of minutes
                        you wish the printer to hang before beginning again.

INSTITUTION/   This is the station number of the site. Once this
STATION NUMBER   has been selected, it should never be changed as this
                        value is encoded in the barcodes for all records in the
                        system.

MAS Parameters

RECORD TYPE   Enter the record type (as defined in Record Type
FOR MEDICAL   Set-up) which should be created for the medical
RECORD   record.

MAS INTERFACE   This is the final step in initializing the MAS
STATUS   application. When set to UP, the system will be
                        live. Choose from: 0-Down   1-Up.

Computer Site Manager's Menu
Record Tracking System Overall Parameters

Film Jacket Tracking Parameters

RECORD TYPE   Enter the record type (as defined in Record Type
FOR MASTER   Set-up) which should be created for the master
JACKET   jacket.

RADIOLOGY   This is the final step in initializing the Radiology
INTERFACE STATUS   Application. When set to UP, the system will be
STATUS   live. Choose from: 0-Down   1-Up.

Example
Below is an example of the MailMan message generated each time the automatic
CLINIC REQUEST INITIALIZATION job is run. It will be sent to the mail group
specified through the CLINIC REQUESTS MAIL GROUP field of the Application
Set-up option, Computer Site Manager' Menu. This example shows the job having
been scheduled to look 5 days ahead (T+5).

```
Subj: Record Tracking Clinic Request Initializer [#116594] 06 JUN 91 17:00
24 Lines
From: POSTMASTER in 'IN' BASKET.  Page 1
-------------------------------------------------------------------------

Clinic Record Request Initialization   START DATE/TIME:  JUN  6, 1991 17:00
                                        STOP DATE/TIME:  JUN  6, 1991 19:06


   # Requests for JUN  6, 1991 =  97
   # Requests for JUN  7, 1991 =  76
   # Requests for JUN  8, 1991 = 102
   # Requests for JUN  9, 1991 =  53
   # Requests for JUN 10, 1991 =  50

   Any day that you DON'T receive this message you should run
   the CLINIC INITIALIZATION option before you run the Pull Lists.

  Terminated User/Borrower Report      START DATE/TIME:  JUN  6, 1991 17: 00
                                        STOP DATE/TIME:  JUN  6, 1991 19:06

'MCREYNOLDS,NICK'        has been terminated and is a 'MAS' Borrower
'MCREYNOLDS,NICK'        has been terminated and is a 'RAD' Borrower

'MCREYNOLDS,NICK'        borrowing privileges are revoked for 'MAS'
'MCREYNOLDS,NICK'        borrowing privileges are revoked for 'RAD'
```

Film Tracking Specific Menu

The Film Tracking Specific and MAS Specific Set-Up Menus have been provided for users who routinely use both applications of Record Tracking (Radiology and Medical Administration) in their daily activities. For example, an MAS clinic clerk may need to request both Radiology and MAS records and view the record profiles of each. Ordinarily such a user would need to exit and reenter Record Tracking in order to gain access to the other application. Assigning the user options from either of these menus will allow them to revert back and forth between applications without having to do this.

With the exception of the Fill Next Clinic Request and Admitting Area Chart Request options on the MAS Specific Set-Up Menu, the options in these menus appear elsewhere in Record Tracking; however they have been renamed here in order to be application specific. When a user calls up one of these options, the system automatically associates it with the correct application.

The Site Manager should note that this function is intended for users having a variety of Record Tracking options on their menu but not the RT Overall Menu. Users having the RT Overall Menu must specify an application upon entering Record Tracking and options from either of these two menus will then only work within their intended application.

Below is a brief description of each option contained in this menu.

IMAGING AREA SET-UP - Used to enter/edit and define/update parameters for each Radiology imaging area

JACKET PROFILE - Provides an abbreviated on-line listing of all Radiology records for a specified patient.

REQUEST FILM JACKETS - Used to enter a request for a patient's Radiology record.

Film Tracking Specific Menu
Imaging Area Set-up

This option is used to enter/edit and define/update parameters for each Radiology imaging area. Imaging areas entered through this option become part of your HOSPITAL LOCATION file (#44). They also become part of your BORROWERS/FILE AREAS file (#195.9).

Field Descriptions

Select Reception Viewing/Rack Area	Enter name of new or existing imaging area for which you wish to define or update parameters. This is a multiple field. For each entry made into this field, the following fields will also be prompted, returning you to this prompt upon completion. You should enter each imaging area which will be associated with your application.
ARE YOU ADDING {Imaging Area} AS A NEW HOSPITAL LOCATION?	YES/NO - This prompt will only appear if your entry at the previous prompt was a new entry.
PHONE #	Enter the telephone number of this area.
LOCATION/ROOM #	Enter the location/room # of this area.
BORROWING PRIVILEGES	Enter the borrowing privileges of this area. Choose from:

>   'N'ORMAL
>   'I'NACTIVATED
>   'R'EVOKED

Hospital Location File Parameters

NAME	You may rename the imaging area at this prompt, or accept the default and continue. Unless you hold the proper FileMan access, you will be unable to delete an imaging area. See your site manager should this be necessary.

Film Tracking Specific Menu
Imaging Area Set-up

INSTITUTION   Institution (from your INSTITUTION file) with
                               which this imaging area is associated.

Select SYNONYM   Enter the synonym by which this imaging area is
                               known.

Record Request to be Made When Making an Appt or Registering a Pt

REQUESTS FOR   Borrower's name to be associated with requests
WHICH BORROWER   from this area. Your entry at the first prompt will
                               appear as a default; however you may enter a different
                               one if you wish.

ARE RECORDS   YES/NO - When patients report to this area, are
REQUIRED   records required? If YES, you will proceed through
                               the following three prompts.

Select RECORD   Enter each record type(s) which will be needed in
TYPE NEEDED   association with visits. This is a multiple field, and
                               you may specify more than one record type.

RECORD TYPE   Your entry at "Select RECORD TYPE NEEDED"
NEEDED   will appear as a default. If incorrect you may enter
                               the correct record type at this prompt; otherwise, you
                               may accept the default by entering <RET>.

VOLUMES   Enter the volumes of this record type which will be
REQUIRED   required in association with these visits. Choose from:

                                   'A'LL
                                   'L'AST
                                   'N'ONE

Film Tracking Specific Menu
Imaging Area Set-up

Scheduled Admissions Borrowers

SCHEDULED ADMISSION BORROWER	YES/NO If YES, when an entry in the SCHEDULED ADMISSIONS file has a type WARD and the ward location matches this ward location borrower, a pull list will be created for this ward location borrower or associated borrower.
TREATING SPECIALTY	BORROWER/FILE AREA entry If an entry in the SCHEDULED ADMISSIONS file has a type TREATING SPECIALTY and the treating specialty matches this borrower's treating specialty, a pull list will be created for this borrower or associated borrower.

Film Tracking Specific Menu
Jacket Profile

This option provides an abbreviated on-line listing of all records for a specified patient. It is the same listing which is displayed throughout the Record Tracking package when a patient name is keyboard entered rather than a barcode being wanded.

This option displays several lines of demographic data related to the patient. For each record (listed by record type), the volume number, current borrower, date/time charged to that borrower and phone/room of the borrower will be shown. Whenever a record is inactive (as a result of being transferred to another facility or inactivated) or charged to a borrower as a result of being on a pull list, it will be so annotated beneath the record. Associated borrowers may also be shown.

Example

```
Select PATIENT:  R1234  RAYBURN,CORNELIUS  04-13-48   222111234



                       **** RADIOLOGY Profile ****
===============================================================================
Name     : RAYBURN,CORNELIUS  (222-11-1234)            Page: 1
Birth Date: APR 13, 1948   Ward: 7C MED          Run Date: JAN 15, 1988
10:42
=========================================== ===================================

   Record Type     Vol   Current Borrower   Date Charged        Phone/Room #
   -----------     ---   ----------------   ------------        ------------
   MASTER FOLDER    V1    WARD 7C            DEC 29, 1987  08:42  3547/7C
                         (DAVID DOUGLAS)                          3547/7C
----------------------------------------------------------------------------
   CHEST FILMS      V1    MAIN FILE ROOM     APR 12, 1987  10:42  2111/301


Select PATIENT: <RET>
```

Film Tracking Specific Menu
Request Film Jackets

The Request Film Jackets option is used to enter a request for a patient's record. The user may request a single record, multiple records or a range of records for a patient. He/she may request the record for the current time or a date/time in the future. The person/location borrowing the record must be in the BORROWER file.

Dependent on how the site parameter is set at your facility, the current borrower of a record may enter a request for that record for a future date. This may be done by wanding the record's barcode label or by keyboard entry. Use of the barcode label reader is the fastest and most accurate method of request.

When record selection is made by entering a patient's name, the system displays the Patient Profile and Short Record Inquiry. This inquiry is a list of the requestable records for that patient in that application. If a record type has been defined as unrequestable through your site parameters, it will not be displayed in the Short Record Inquiry. If the record requested has been inactivated or transferred out to another facility, it will not be displayed in the inquiry. Wanding the barcode label of an unrequestable record will result in the message, "No match found" being displayed. After the record(s) is selected, a request profile will be displayed for each record. This includes the current location of the record, the home file room of the record, recent pending requests, etc. A sequential request number is automatically assigned by the system for each record requested.

Film Tracking Specific Menu
Request Film Jackets

Example

```
Select Record:  MCRANEY,JEREMY      10-10-44    555999888


                          **** RADIOLOGY Profile ****
===============================================================================
Name      : MCRANEY,JEREMY (555-99-9888)                            Page: 1
Birth Date: OCT 10, 1944                        Run Date: DEC  7, 1987  13:21
===============================================================================

Record Type        Vol   Current Borrower  Date Charged         Phone/Room #
-----------        ---   ----------------  ------------         -----------
1  MASTER FOLDER  V1    MAIN FILE ROOM    NOV 23, 1987 14:04   231/SUITE 4307
-------------------------------------------------------------------------------
2  CHEST FILMS    V1    TROST,PETER       DEC  3, 1987 15:53   530/827B


Select MCRANEY,JEREMY's Records from List:   1


                **** Request Profile for MASTER FOLDER Vol: 1 ****
===============================================================================
Name      : MCRANEY,JEREMY (555-99-9888)                            Page: 1
Birth Date: OCT 10, 1944                        Run Date: DEC  7, 1987  13:21
-------------------------------------------------------------------------------
Current   : MAIN FILE ROOM       Phone   :231      |Home : MAIN FILE ROOM
Since...  : NOV 23, 1987  14:04   Location:Suite 4307  |Phone: 231
===============================================================================
                                                  [* pull list request ]
Record  Requestor        Date Needed       Phone/Room#         Request#
-------------------------------------------------------------------------------
     No requests

Request No. 37:
---------------
REQUESTING RECORD FOR WHICH BORROWER:   BAVARO,MELINDA      BAVARO,MELINDA
       ...OK? YES//  <RET>  (YES)        RADIOLOGY

  Update Borrower Information:
  ---------------------------
  PHONE #: 357//  <RET>
  LOCATION/ROOM#: 345A//  <RET>
  ---------------------------
DATE/TIME RECORD NEEDED: NOW//  <RET>  (DEC  7, 1987  13:22)
COMMENT:  <RET>
   ...notice for request #37 has been queued to print on device A143

   ...request filed
```

MAS Specific Set-up Menu

The Film Tracking Specific and MAS Specific Set-Up Menus have been provided for users who routinely use both applications of Record Tracking (Radiology and Medical Administration) in their daily activities. For example, an MAS clinic clerk may need to request both Radiology and MAS records and view the record profiles of each. Ordinarily such a user would need to exit and reenter Record Tracking in order to gain access to the other application. Assigning the user options from either of these menus will allow them to revert back and forth between applications without having to do this.

With the exception of the Fill Next Clinic Request and Admitting Area Chart Request options on the MAS Specific Set-Up Menu, the options in these menus appear elsewhere in Record Tracking; however they have been renamed here in order to be application specific. When a user calls up one of these options, the system automatically associates it with the correct application.

The Site Manager should note that this function is intended for users having a variety of Record Tracking options on their menu but not the RT Overall Menu. Users having the RT Overall Menu must specify an application upon entering Record Tracking and options from either of these two menus will then only work within their intended application.

Below is a brief description of each option contained in this menu.

RE-CHARGE A CHART - Used to record transfer of those records charged from the file room from one borrower to another.

CHART REQUEST - Used to enter a request for a patient's MAS record.

ADMITTING AREA CHART REQUEST - Used to request records from an MAS admitting area.

ADMITTING AREA SET-UP - Used to enter/edit and define/update parameters for each MAS admitting area.

CREATE MAS LABELS/RECORDS/VOLUMES - Used to print barcode labels and/or create new MAS records or additional volumes for a patient.

FILL NEXT CLINIC REQUEST - Allows filling of subsequent MAS record requests for patients having multiple appointments on the same day.

PROFILE OF CHARTS - Provides an abbreviated on-line listing of all MAS records for a specified patient.

MAS Specific Set-up Menu
Re-Charge a Chart

The Re-Charge a Chart option is used to record transfer of those records charged from the file room from one borrower to another. It is for use with in-house borrowers only. Transfer of records to other institutions should be entered through the Transfer Records option. The system records the new borrower, location/phone and date/time of recharge. This information is displayed each time the associated record inquiry is accessed through the Record Tracking system.

Upon exiting the option, the records will either be recharged immediately or queued for recharge depending upon site parameters and the number of records entered during the session.

Missing flags may be removed thru this option and records may be created for patients already in your database but having no records in the Record Tracking system. These will be created in accordance with site specifications for initial creation of records.

Example

```
===============================================================================
[RE-CHARGE OPTION]
Select Borrower: <WAND>  44/150      PLASTIC CLINIC       SURGICAL SERVICE

Select Record: <WAND> 500/179H RAFFERTY,PETER    Type:  MEDICAL RECORD
          SSN: 123-12-4567                        Date of Birth: MAR 25, 1921
     Location: DERMATOLOGY                          Phone/Room: 3542/218A
-------------------------------------------------------------------------------
   ...added to list to be re-charged

Select Record: <WAND> 500/270B SHELDON,HOWARD    Type:  MEDICAL RECORD (V1)
          SSN: 221-21-1212                        Date of Birth: JAN 20, 1949
     Location: DERMATOLOGY                          Phone/Room: 3542/218A
-------------------------------------------------------------------------------
   ...added to list to be re-charged

Select Record: <WAND> 500/268I MARTIN,RAYMOND    Type:  MEDICAL RECORD (V1)
          SSN: 211-12-2121                        Date of Birth: FEB  2, 1937
     Location: DERMATOLOGY                          Phone/Room: 3542/218A
------------------------------------------- -----------------------------------
   ...added to list to be re-charged

Select Record: <RET>
   ...records have been QUEUED to be re-charged to 'PLASTIC CLINIC'.
===============================================================================
[RE-CHARGE OPTION]
Select Borrower:  <RET>
```

MAS Specific Set-up Menu
Chart Request

The Chart Request option is used to enter a request for a patient's record. The user may request a single record, multiple records or a range of records for a patient. He/she may request the record for the current time or a date/time in the future. The person/location borrowing the record must be in the BORROWER file.

Dependent on how the site parameter is set at your facility, the current borrower of a record may enter a request for that record for a future date. This may be done by wanding the record's bar code label or by keyboard entry. Use of the bar code label reader is the fastest and most accurate method of request.

When record selection is made by entering a patient's name, the system displays the Patient Profile and Short Record Inquiry. This inquiry is a list of the requestable records for that patient in that application. If a record type has been defined as unrequestable through your site parameters, it will not be displayed in the Short Record Inquiry. If the record requested has been inactivated or transferred out to another facility, it will not be displayed in the inquiry. Wanding the bar code label of an unrequestable record will result in the message, "No match found" being displayed. After the record(s) is selected, a request profile will be displayed for each record. This includes the current location of the record, the home file room of the record, recent pending requests, etc. A sequential request number is automatically assigned by the system for each record requested.

Example

```
Select Record:  MCRANEY,JEREMY     10-10-44    555999888

                       **** MEDICAL ADMINISTRATION Profile ****
=============================================== =====================================
Name     : MCRANEY,JEREMY  (555-99-9888)                         Page: 1
Birth Date: OCT 10, 1944                         Run Date: DEC  7, 1987  13:21
=============================================== =====================================

Record Type            Vol    Current Borrower   Date Charged          Phone/Room #
-----------            ---    ----------------   -----------           -----------
1  MEDICAL RECORD      V2     MAS FILE ROOM      NOV 23, 198 7 14:04    231/SUITE
4307
2  MEDICAL RECORD      V1     MAS FILE ROOM      NOV 24, 1987 08:33     231/SUITE
4307
--------------------------------------------------------------------------------
-
3  ADMINISTRATIVE RECORD  V2   COOPER,MARCUS    DEC  1, 1 987 10:39    456/645D
4  ADMINISTRATIVE RECORD  V1   TROST,PETER      DEC  3, 1987 15:53     530/827B

Select MCRANEY,JEREMY's Records from List:  1,2
```

MAS Specific Set-up Menu
Chart Request


```
                    **** Request Profile for MEDICAL RECORD Vol : 2 ****
=================================================================================
Name     : MCRANEY,JEREMY  (555-99-9888)                          Page: 1
Birth Date: OCT 10, 1944                        Run Date: DEC  7, 1987  13:21
---------------------------------------------------------------------------------
Current  : MAS FILE ROOM        Phone   :231           |Home : MAS FILE ROOM
Since... : NOV 23, 1987  14:04   Location:Suite 4307    |Phone: 231
=================================================================================
                                                         [* pull list request]
Record  Requestor           Date Needed         Phone/Room#         Request#
---------------------------------------------------------------------------------
     No requests

Request No. 37:
---------------
REQUESTING RECORD FOR WHICH BORROWER:  BAVARO,MELINDA      BAVARO,MELINDA
         ...OK? YES//  <RET>   (YES)      MEDICAL ADMINISTRATION

  Update Borrower Information:
  ---------------------------
  PHONE #: 357//  <RET>
  LOCATION/ROOM#: 345A//   <RET>
-------------------------------
DATE/TIME RECORD NEEDED: NOW//  <RET>   (DEC  7, 1987  13:22)
COMMENT:  <RET>
   ...notice for request #37 has been queued to print on device A143




                    **** Request Profile for MEDICAL RECORD Vol: 1 ****
=================================================================================
Name     : MCRANEY,JEREMY  (555-99-9888)                          Page: 1
Birth Date: OCT 10, 1944                        Run Date: DEC  7, 1987  13:22
---------------------------------------------------------------------------------
Current  : MAS FILE ROOM        Phone   :231           |Home : MAS FILE ROOM
Since... : NOV 24, 1987  08:33   Location:Suite 4307    |Phone: 231
=================================================================================
                                                         [* pull list request]
Record     Requestor           Date Needed      Phone/Room#         Request#
---------------------------------------------------------------------------------
1  MED1   COOPERMAN,SALLY      DEC 10, 1987     999/ 234C                29
    (Comment:  REVIEW CHART PRIOR TO PATIENT'S VISIT)

Request No. 38:
---------------
COMMENT:  <RET>
   ...notice for request #38 has been queued to print on device A143
   ...request filed
```

MAS Specific Set-up Menu
Admitting Area Chart Request

This option is used in the Medical Administration application of Record Tracking to request records from an admitting area.

You will first be prompted for name of the patient whose records you are requesting. If your site has more than one admitting area (as defined through site parameters) you may also be prompted for the name of the admitting area from which you are requesting records. Based on the patient name entered and the record types to be requested for that admitting area (as defined through site parameters), the system will determine the appropriate records to request and home location (file room) from which to request them. A request notice will automatically print on the printer specified for the file room.

Example

Select PATIENT NAME: WILSON,HAROLD   02-22-22   123 45 6789

Select Admitting Area: FRONT DESK

ISSUE REQUEST FOR RECORDS? YES// <RET>

Select PATIENT NAME: <RET>

MAS Specific Set-up Menu
Admitting Area Set-up

This option is used to enter/edit and define/update parameters for each MAS admitting area. Admitting areas entered through this option become part of your HOSPITAL LOCATION file (#44). They also become part of your BORROWERS/FILE AREAS file (#195.9).

Field Descriptions

Select Admitting Area	Enter name of new or existing admitting area for which you wish to define or update parameters. This is a multiple field. For each entry made into this field, the following fields will also be prompted, returning you to this prompt upon completion. You should enter each admitting area which will be associated with your application.
ARE YOU ADDING {Admitting Area} AS A NEW HOSPITAL LOCATION?	YES/NO - This prompt will only appear if your entry at "Select Admitting Area" was a new entry.
PHONE #	Enter the telephone number of this area.
LOCATION/ROOM #	Enter the location/room # of this area.
BORROWING PRIVILEGES	Enter the borrowing privileges of this area. Choose from:

       'N'ORMAL
       'I'NACTIVATED
       'R'EVOKED

MAS Specific Set-up Menu
Admitting Area Set-up

Hospital Location File Parameters

NAME	Your entry at "Select Admitting Area" will appear as a default. You may rename the admitting area or accept the default and continue. Unless you hold the proper FileMan access, you will be unable to delete an admitting area. See your site manager should this be necessary.
INSTITUTION	Enter the institution (from your INSTITUTION file) with which this admitting area is associated.
Select SYNONYM	Enter the synonym by which this admitting area is known. For example, Reception might be a synonym for your admitting area.

Record Request to be Made When Making an Appt or Registering a Pt

REQUESTS FOR WHICH BORROWER	Borrower's name to be associated with requests from this area. Your entry at "Select Admitting Area" will appear as a default; however, you may enter a different one if you wish.
ARE RECORDS REQUIRED	YES/NO - When patients report to this area, are records required? If YES, you will proceed through the following three prompts.
Select RECORD TYPE NEEDED	Enter each record type(s) which will be needed in association with visits. This is a multiple field, and you may specify more than one record type.
RECORD TYPE NEEDED	Your entry at "Select RECORD TYPE NEEDED" will appear as a default. If incorrect you may enter the correct record type at this prompt; otherwise, you may accept the default by entering <RET>.

**MAS Specific Set-up Menu
Admitting Area Set-up**

VOLUMES   Enter the volumes of this record type which will be
REQUIRED   required in association with these visits. Choose from
                     ALL, LAST, NONE.

Scheduled Admissions Borrowers

SCHEDULED   YES/NO   If YES, when an entry in the SCHEDULED
ADMISSION   ADMISSIONS file has a type WARD and the ward
BORROWER   location matches this ward location borrower, a pull
                     list will be created for this ward location borrower
                     or associated borrower.

TREATING   BORROWER/FILE AREA entry   If an entry in the
SPECIALTY   SCHEDULED ADMISSIONS file has a type
                     TREATING SPECIALTY and the treating specialty
                     matches this borrower's treating specialty, a pull list
                     will be created for this borrower or associated
                     borrower.

MAS Specific Set-up Menu
Create MAS Labels/Records/Volumes

The Create MAS Labels/Records/Volumes option is used to print bar code labels and/or create new records or additional volumes for specified patients. You may use it to create records and associated bar code labels for patients new to the system or to create additional records/volumes and associated bar code labels for patients already in the system. You may also use it to print bar code labels for existing records. This option is not intended for initialization purposes, as it works on a patient-by-patient basis. The Computer Site Manager's Initialization Menu is provided for that purpose.

Only patients already in your database may be entered. For all patients, records will be created according to site parameters defined for the MAS application.

For new patients, records will be created according to your site's specifications for initial record creation. For example, if you are creating a medical record for a new patient in MAS, and your site has defined administrative records "linked" with medical records through the Type of Record Set-up option in the System Definition Menu, the system would also automatically create an administrative record. This would apply only to patients not already in the system.

For patients already in the system, you may specify one record/volume at a time and will be given the opportunity to transfer pending requests for the record type being created to the newest volume.

For each record/volume created, the system will assign a record identifier number, prompt for home location and current borrower/file room, and print a bar code label.

Example

```
Select PATIENT: S7340   SULLIVAN,TOM      01-23-44       224244242
Searching for a PATIENT SULLIVAN,TOM      01-23-44        224244242

Do you want the PATIENT 'SULLIVAN,TOM' as your answer? Yes//  <RET>
```

MAS Specific Set-up Menu
Create MAS Labels/Records/Volumes


```
                        **** MEDICAL ADMINISTRATION Profile ****
===============================================================================
Name      : SULLIVAN,TOM (224-24-4242)          Page: 1
Birth Date: JAN 23, 1944                    Run Date: JUN 2 2, 1987  11:17
===============================================================================

   Record Type       Vol  Current Borrower  Date Charged       Phone/Room #
   -----------       ---  ----------------  ------------       ------------
1  MEDICAL RECORD    V1   7A(NHCU)          MAY 22, 1987 10:13
                          (FRANK MARVIN)                       (500/285H)
-------------------------------------------------------------------------------
2  ADMINISTRATIVE F  V1   MAS FILE ROOM     MAY 12, 1987 10:42  472-4307/SUITE

Select Labels from List: 2
   ...label for record #325 has been queued to print on device A143


Select PATIENT: SMITH,DAN          02-22-22          321211234
Searching for a PATIENT SMITH,DAN          02-22-22          321211234

Do you want the PATIENT 'SMITH,DAN' as your answer? Yes//  <RET>

                  **** MEDICAL ADMINISTRATION Profile ****
===============================================================================
Name      : SMITH,DAN   (321-21-1234)          Page: 1
Birth Date: FEB  2, 1922                    Run Date: JUN 22, 1987  11:17
===============================================================================

   No 'MEDICAL ADMINISTRATION' records on file.

Do you wish to create a new record or volume? No// Yes

Select NEW Record Type: MEDICAL RECORD

MEDICAL RECORD Creation:
------------------------
HOME LOCATION: MAS FILE ROOM// <RET>
CURRENT BORROWER/FILE ROOM: MAS FILE ROOM// <RET>
  ...'MEDICAL RECORD         VOL: 1' created (#430)
  ...label for record #430 has been queued to print on device A143

ADMINISTRATIVE FOLDER Creation:
-------------------------------
HOME LOCATION: MAS FILE ROOM// <RET>
CURRENT BORROWER/FILE ROOM: MAS FILE ROOM// <RET>
  ...'ADMINISTRATIVE FOLDER     VOL: 1' created (#43 1)
  ...label for record #431 has been queued to print on device A143

Select PATIENT: <RET>
```

MAS Specific Set-up Menu
Fill Next Clinic Request

The Fill Next Clinic Request option is provided to allow filling of subsequent record requests for patients having multiple appointments on the same day.

You will be prompted to enter the patient's name. The system then displays a request profile of all the patient's record requests pending for the current date and prompts you to select the one(s) you wish to fill.

Example

```
Select PATIENT: MEYER,DAVID       MEYER, DAVID     02-02-22      345930493

                   Request Profile for MEDICAL ADMINISTRATION Records
=============================================================================
Name      : MEYER,DAVID         (345930493)                  Page: 1
Birth Date: FEB  2, 1922                    Run Date: MAR 10, 1988  09:12
================================================================ ==============
                                                   [* pull list request]
     Record  Requestor      Date Needed          Phone/Room#      Request#
     ------------------------------------------------------------------------
1  MR2     DERMATOLOGY    MAR 10, 1988  09:30     257A/3827            386
2  ADM1    DERMATOLOGY    MAR 10, 1988  09:30     257A/3827            387
3  MR2     ORTHOPEDIC     MAR 10, 1988  13:15     387B/3982            428

Choose Requests from List: 1,2

Will now fill requests selected...
    ...request for MEYER,DAVID'S MEDICAL RECORD (V2) filled
    ...request for MEYER,DAVID'S ADMINISTRATIVE FOLDER (V1) filled

Select PATIENT: <RET>


  ...added to list to be re-charged

Select Record: <RET>
```

MAS Specific Set-up Menu
Profile of Charts

This option provides an abbreviated on-line listing of all records for a specified patient. It is the same listing which is displayed throughout the Record Tracking package when a patient name is keyboard entered rather than a bar code being wanded.

This option displays several lines of demographic data related to the patient. For each record (listed by record type), the volume number, current borrower, date/time charged to that borrower and phone/room of the borrower will be shown. Whenever a record is inactive (as a result of being transferred to another facility or inactivated) or charged to a borrower as a result of being on a pull list, it will be so annotated beneath the record. Associated borrowers may also be shown.

Example

```
Select PATIENT:  R1234  RAYBURN,CORNELIUS  04-13-48   222111234


                      **** MEDICAL ADMINISTRATION Profile ****
==================================================================================
Name     : RAYBURN,CORNELIUS (222-11-1234)           Page: 1
Birth Date: APR 13, 1948   Ward: 7C MED         Run Date: JAN 15, 1988  10:42
==================================================================================

   Record Type      Vol   Current Borrower  Date Charged          Phone/Room #
   -----------      ---   ----------------  ------------          ------------
   MEDICAL RECORD   V1    WARD 7C           DEC 29, 1987  08:42   3547/7C
                          (DAVID DOUGLAS)                         3547/7C
   -------------------------------------------------------------------- -------------
   ADMINISTRATIVE F  V1    MAS FILE ROOM     APR 12, 1987  10:42  2111/301


Select PATIENT:  RICHARDS,JOHN  02-04-08    234444321

                      **** MEDICAL ADMINISTRATION Profile ****
============================================= ====================================
Name     : RICHARDS,JOHN (234-44-4321)            Page: 1
Birth Date: FEB  4, 1908                     Run Date: JAN 15, 1988  10:43
                      ***** Date of Death: MAR  6, 1985 **** *
==================================================================================
   Record Type      Vol   Current Borrower  Date Charged          Phone/Room #
   -----------      ---   ----------------  ------------          ------------
   MEDICAL RECORD   V1    MAS FILE ROOM     DEC 29, 1987  08:42   3547/7C
   --------------------------------------------------------------------------------
   ADMINISTRATIVE F  V1    REGIONAL OFFICE   APR 12, 1987  10:42  2111/301
      ****INACTIVE****
```

MAS Specific Set-up Menu
Profile of Charts

Select PATIENT: S2727 SCHWARTZ,WILLIAM   01-01-50   272722727

```
                    **** MEDICAL ADMINISTRATION Profile ****
================================================================================ =======
Name     : SCHWARTZ,WILLIAM   (272-72-2727)             Page: 1
Birth Date: JAN  1, 1948                       Run Date: JAN 15, 1988  10:44
================================================================================

   Record Type      Vol   Current Borrower   Date Charged        Phone/Room #
   ----------       ---   ----------------   ------------        ------------
   MEDICAL RECORD   V1    SURGICAL CL        JAN 14, 1988  08:40 5273/607A
   (Pull List: SURG CL [01-14-88]
--------------------------------------------------------------------------------
   ADMINISTRATIVE F  V1    MAS FILE ROOM      MAY 12, 1987  11:20  2111/301
```


Select PATIENT: <RET>

Glossary

abbreviation
: An accepted standard way of shortening responses. The Record Tracking system accepts responses that eliminate characters from the end of a word or phrase.

access
: The approach used to get at something, as in accessing a menu. You most likely have been assigned access codes which are necessary for you to enter the system. Access may also indicate what functions you are allowed to use; i.e. your level of access.

associated borrower
: An individual associated with a location borrowing a record so that other users are given a name to contact when inquiring about the record. For example, if a ward were borrowing a patient's record, the name of the ward administration coordinator might be entered as an associated borrower.

bar code label
: A label consisting of a number of printed bars and intervening spaces set up such that it is recognized as that of a specific entity when read by a bar code reader. Used to identify records, borrower and requests in Record Tracking.

borrower
: A location, entity or individual to whom records are loaned. Within Record Tracking, this may be a physician, employee, clinic, ward, hospital location, other VA facility or patient.

format
: The system specifications of what type of characters should make up a response and how long it should be.

function
: A job performed by the computer; i.e. in Record Tracking, charging-out a record to a specific borrower would be considered a function.

HELP menu
: A message or series of messages designed to aid the user in making an appropriate response to a prompt. A HELP menu is accessed by entering a question mark <?> or marks <??> at the prompt.

home location	A record's place of residence when it is not being borrowed; usually the file room.
interactive system	A computer system that performs an immediate action based on the user's responses to the system prompts. This involves a conversation between the computer and the user.
loose filing indicator	A field in Record Tracking which may be set to YES for a specified record charged out of its home location such that a message will be displayed upon check-in of the record advising there is loose filing for it.
military time	The standard method of recording time used by the United States Military. See conversion table at the end of this glossary.
movement type	In Record Tracking, the term movement type relates to the various actions which may be performed on a record; charging-out, checking-in, flagging as missing are all considered movement types.
option	An entity which performs a specific job/function within a package whose name generally indicates the job it performs. Options are grouped together under submenus and main menus. In Record Tracking, Charge-Out Records is an option.
prompt	Messages on the screen which ask you to provide information.
pull list	In Record Tracking, a list of record requests needed at the same date/time by a specific borrower.
record	In Record Tracking, this term generally relates to the patient's medical record, administrative record or radiology record. Since Record Tracking may be applied to a variety of tracking activities (such as a library), this term is used to specify the item which is tracked by the system.

record no.	Also known as the Record Identifier Number. This is a sequential number assigned to each record within Record Tracking upon its creation which is unique to the record. This number may be entered at any "Select Record" prompt to access that particular record and is analogous to wanding the record's bar code label.
request	In Record Tracking, the act of asking for a specific record. A request label is usually generated by this request which indicates the record asked for, the time needed, the requestor and other pertinent information. This label also contains a bar code which may be wanded such that the request is filled, thus the requested record is charged to the requestor.
retirement status	In Record Tracking, the retirement status indicates whether or not a record may be retired from the file room after the allotted period of inactivity. There are three retirement statuses: OK TO RETIRE, TUMOR REGISTRY and TEACHING. Records are considered OK TO RETIRE by the system unless otherwise specified through the Update Record's Attributes option of the Transaction Menu.
<RETURN> or <RET>	The key which is pressed after each response to enter the response into the system and move to the next prompt.
security code	A code assigned to each user identifying them specifically to the system and allowing them access to the functions/options assigned to them.
security key	Used in conjunction with locked options or functions. Only holders of this key may perform these options/ functions. Used for options which perform a sensitive task.

Index

Edit a Request
Edit Pull List Comment
Entire Pull List Cancellation
Entire Pull List Cancellation (all dates)
Expanded Record Inquiry

Flag Record as Missing
File Room/Remote Set-up (Site Mgr)
File Room Set-up
File Room Set-up (Site Mgr)
Fill a Request
Fill Next Clinic Request
Film Tracking Specific Menu

Generate Record Retirement Pull Lists

Imaging Area Set-up
Imaging Area Set-up (Site Mgr)
Inactivate/Reactivate Records
Inactivate Records Menu
Initialization Menu
Initialize Records (NO LABELS)
Inpatient Barcode Labels Only
Inpatient Record Location List

Jacket Profile

Label Formatter
Label Functions Menu
Loose Filing Report

Management Reports Menu
MAS Specific Set-up Menu
Missing Records List
Move Requests to Last Volume
Movement Type Set-up
Multiple New Volume Creation

New Volume Creation

Overdue Records List

Data Supplement

The following is a list of prompts with associated definitions and possible entries which occur in Record Tracking. Prompts are in bold print listed in alphabetical order, much as they will appear on the screen.

The most common defaults, when applicable, have been included in this Data Supplement. You may, however, note some discrepancies between those which appear on your screen and those in this supplement. This may be attributed to two factors; defaults to some prompts vary according to site parameters, and certain prompts may contain defaults in some options while not in others. It is important to note that whenever a default appears with a prompt on the screen, the entry of a <RET> will always signify its acceptance.

You should also note that entry of an up-arrow <^> may be used to abort processing. In some cases, a <RET> or NO may also be entered to abort processing. In each case, such an entry will either return you to the menu or to a prompt in the option from which you may abort or make another selection.

'ALL' INPATIENTS OR A 'RANGE' OF ADMISSIONS? RANGE//
This prompt appears when running the Inpatient Record Location List option of the Management Reports Menu. You are asked to specify whether you wish to run the list for all current inpatients or those admitted within a specified date range. You may enter:

```
.<RET> or 'R'ANGE - you will subsequently be prompted for a date range
.'A'LL
```

ARE YOU ADDING '{PULL LIST}' AS A NEW PULL LIST?
YES/NO   This prompt appears in the Create a Pull List option of the Pull List Functions Menu asking you to confirm your previous entry as a new pull list.

ARE YOU SURE YOU WANT TO 'CHARGE OUT' THESE RECORDS? No//
YES/NO   This prompt appears in the Charge Out Pull List Records option of the Pull List Functions Menu asking you to confirm whether you wish to charge out the selected pull list(s).

ARE YOU SURE YOU WANT TO CANCEL THIS PULL LIST? No//
YES/NO   This prompt appears in the Entire Pull List Cancellation option of the Pull List Functions Menu asking you to confirm whether you wish to cancel the selected pull list.

ARE YOU SURE YOU WANT TO CANCEL THIS/THESE REQUESTS? No//
YES/NO   This prompt appears in the Cancel a Request and Cancel Request From Pull List options of the Request Records and Pull List Functions Menus respectively, asking you to confirm whether you wish to cancel the selected request(s).

ARE YOU SURE YOU WANT TO CHANGE THE DATE THE RECORDS ARE NEEDED? No//

YES/NO   This prompt appears in the Pull List Date Change option of the Pull List Functions Menu asking you to confirm whether you wish to change the date records on the selected pull list are needed.

ARE YOU SURE YOU WANT TO DELETE THIS RECORD? No//

YES/NO   This prompt appears in the Delete a Record option of the Transaction Menu asking for confirmation that you wish to delete the selected record.

ARE YOU SURE YOU WANT TO FLAG THIS RECORD AS MISSING? No//

YES/NO   This prompt appears in the Flag a Record as Missing option of the Transaction Menu asking you to confirm whether you wish to place a missing flag on the selected record.

ASSOCIATED BORROWER

This prompt may appear (depending upon your site parameters) in a number of options throughout Record Tracking after entry of the borrower of a record. Generally, it is used to enter the name of an individual who may be contacted when inquiries are made about the record when the actual borrower entered is a location (i.e., a clinic or a ward). For example, if the borrower is a ward, your entry at the associated borrower prompt would most likely be the Ward Administration Coordinator. The name entered must be in the BORROWERS/FILE AREAS file.

BEGINNING ADMISSION DATE/TIME

This prompt appears in the Inpatient Record Location List option of the Management Reports Menu when you elect to run the list within a range of admission dates rather than for all inpatients. Your entry at this prompt should be an admission date/time at which you wish the report to begin. Date/time entry should be made using a conventional date/time entry method.

BEGINNING DATE

This prompt appears in the Ad Hoc Request Response Statistics option of the Management Reports Menu in association with the specification of a date range in which to run the report. Your entry at this prompt should be the date/time at which the report should begin.

BORROWER

This prompt appears in the Create a Pull List option of the Pull List Functions Menu asking you to enter the borrower to whom the pull list will subsequently be charged. This should not be confused with the requestor (individual entering the requests/pull list). They may be the same in some cases. For example, John Clerk (the requestor) may create a pull list for the Correspondence Unit (the borrower). The borrower entered must be in the BORROWERS/FILE AREAS file. You may enter:

```
.name of borrower
.wand borrower barcode label
.<RET> not allowed; an entry in this field is required in order to proceed
.up-arrow <^> to abort processing; pull list will be deleted
```

CHOOSE REQUEST FROM LIST

This prompt appears in association with the display of a patient's request profile. You may select your request(s) by entering the corresponding number(s) from the left side of the display. You may enter:

```
.a single number
.several numbers separated by commas; i.e. 1,3,5
.a range of numbers; i.e. 1-4
.a combination of several numbers and a range; i.e. 1,3,4-7
```

COMMENT

This is a word processing field in the Request a Record option, Request Records Menu. You may enter a free text comment pertaining to the request. You may enter:

```
.free text comment regarding request
.<RET> to leave blank
```

COMMENTS

This is a word processing field which appears in the Create a Pull List and Edit Pull List Comment options of the Pull List Functions Menu. A free text comment may be entered pertaining to the selected pull list. You may enter:

```
.free text comment regarding pull list
.<RET> to leave blank
```

CREATE {RECORD TYPE} VOLUMES STARTING WITH #{N}? No//

YES/NO   This prompt appears in the Multiple New Volume Creation option of the Transaction Menu. The number inserted by the system {N} will be the next consecutive volume number of the specified record type for the patient with whom you are working.

CONTENT DESCRIPTOR

Depending upon your site parameters, this may be prompted when creating a record or updating its attributes. You may enter a brief description of the contents of the record at this prompt.

CURRENT BORROWER/FILE ROOM: {DEFAULT DEFINED THROUGH PARAMETERS}//

This prompt appears in the options Create a Label/Record/Volume and New Volume Creation options of the Transaction Menu. The default will be the default initial borrower specified in your site parameters. You may enter:

```
.<RET> or up-arrow <^> to accept default; processing will c ontinue
.another borrower (from BORROWERS/FILE AREAS file)
```

DATE

This prompt appears in the Retrieval Rate Statistics option of the Management Reports Menu asking for a date for which to run the report.

DATE RECORDS NEEDED

This prompt appears in the option Create a Pull List of the Pull List Functions Menu. You are prompted to enter the date/time the records on the pull list will be needed by the borrower. An entry in this field is required in order to proceed.

DATE/TIME RECORD NEEDED: NOW//

This prompt appears in the Request a Record option of the Request Records Menu asking for the date/time the requested record is needed. You may accept the default or enter a different date/time record will be needed. You may enter:

```
.<RET> to accept default of NOW (request label will be printed
 on default device)
.a future date/time records are needed (request will be filed)
.up-arrow <^> to abort; request will be deleted
```

DETAILED OR SUMMARY REPORT: S//
This prompt appears in the Retrieval Rate Statistics option of the Management Reports Menu asking if you want the report to include one overall stat total (summary) or break it out by pull list (detailed). You may enter:

```
.<RET> or 'S'UMMARY
.'D'ETAILED
```

DO YOU STILL WANT TO 'FILL' SELECTED REQUESTS? No//
YES/NO   This prompt appears in the Fill a Request option of the Request Records Menu when an up-arrow <^> has been entered at the "Fill Which Request" prompt.

DO YOU STILL WISH TO '{CHARGE-OUT/CHECK IN/RE-CHARGE/TRANSFER-TRANSFER BACK/REQUEST}' SELECTED RECORDS? No//
YES/NO   This prompt will appear in the following options when an up-arrow <^> is entered at the "Select Record" prompt AND a record(s) has already been entered (and accepted by the system) for processing: Charge Out Records, Check In Records, Re-Charge Records, Transfer Records of the Transaction Menu, and Request a Record of the Request Records Menu.

DO YOU WANT TO APPROVE/DISAPPROVE THE FINDING OF THE RECORD? No action//
This prompt appears when a user holding the FR SUPERVISOR KEY accesses a record which has been Found Pending Supervisor Approval. You may enter:

```
.APPROVE - you will subsequently be prompted through the approval procedure
.DISAPPROVE
```

DO YOU WANT TO CHANGE STATUS TO '{REQUESTED/NOT FILLABLE}'? YES//
YES/NO   This prompt appears in the Designate Requests As 'Not Fillable' options of both the Request Records and Pull List Functions Menus, as well as the Charge Out Pull List Records option of the Pull List Functions Menu. It will be preceded by a message giving the current status of the selected request.

DO YOU WANT TO CHANGE THIS RECORD'S HOME LOCATION? No//
YES/NO   This prompt appears in the Check In Records option of the Transaction Menu when the home location of a record selected for check-in is different from the location (file room) it is being checked into.

DO YOU WANT TO CHARGE OUT RECORDS TO A HOLDING AREA? No//
This prompt appears in the Charge Out Pull List Records option of the Pull List Functions Menu. You may enter:

```
.<RET> or NO
.YES - you will be prompted for the name of the holding area to which the
records should be charged
```

DO YOU WANT TO CHECK IN THE RECORD TO THE NEW HOME FILE ROOM? NO//
YES/NO   This prompt occurs in the option Update Record's Attributes of the Transaction Menu when the home location of a record has been changed.

DO YOU WANT TO CREATE {RECORD TYPE} VOL # {N}? No//
YES/NO   This prompt appears when creating new volumes/records in either Create a
Label/Record/Volume or New Volume Creation options of the Transaction Menu. The number {N}
inserted by the system will be the next consecutive volume number for the specified record type of
the selected patient. You may enter:

    .<RET>, NO, or up-arrow <^> to abort processing
    .YES to create the record type and volume specified

DO YOU WANT TO FILL A PENDING REQUEST? No//
This prompt may appear in either the Charge-Out Records or Check-In Records option of the
Transaction Menu when the selected record has a pending request for the current date. It will be
preceded by a message advising of the pending request. The prompt will appear in the Charge-Out
Records option only when the borrower is the same as the requestor of the record (and the request
is for the current date). It appears in the Check-In Records option whenever the selected record has
a pending request for the current date.

DO YOU WANT TO INCLUDE UNFILLED CLINIC REQUESTS? No//
YES/NO   This prompt appears when using the Pending Request List option of the Management
Reports Menu. When YES is answered, the list will include all pending requests associated with
pull lists as well as individual record requests.

DO YOU WANT TO REMOVE THE 'MISSING' FLAG ON THIS RECORD? No//
YES/NO   This prompt may appear when a record flagged as missing has been accessed. Its
appearance will depend upon whether the user has the necessary access to remove a missing flag
(as defined in your site parameters). If YES, you will be prompted through the process of removing
the missing flag.

DO YOU WANT TO SEE MORE 'HELP' INFORMATION? No//
YES/NO   This prompt appears in a variety of Record Tracking options after a <?> has been entered
at a prompt asking if you wish to see additional HELP information.

DO YOU WANT TO USE THE FILE ROOM'S DEFAULT DEVICES? NO//
YES/NO   This prompt appears if you have access to more than one file room in Record Tracking;
i.e., application coordinators, supervisors, site managers, etc. Most users have access to only one
file room which they are automatically dropped into upon entering Record Tracking. You will first
be prompted for the file room from which you wish to track records, then this prompt will be
displayed asking whether you wish to use the file room's default devices or specify your own
printing devices when it is necessary to print a label or report.

DO YOU WISH TO CREATE A NEW RECORD OR VOLUME? No//
YES/NO   This prompt appears in the Create a Label/Record/Volume option of the Transaction
Menu. If YES, you will be prompted through the process of creating a new record/volume.

DO YOU WISH TO FIRST DESIGNATE SOME REQUESTS AS 'NOT FILLABLE'? No//
YES/NO   This prompt appears in the option Charge Out Pull List Records of the Pull List
Functions Menu giving you the opportunity to first designate certain requests on the pull list as not
fillable. Records designated not fillable will not be charged to the pull list borrower when the pull
list is charged out.

ENDING ADMISSION DATE/TIME

This prompt occurs when you elect to run the Inpatient Record Location List within a range of admission dates rather than for all inpatients. Your entry should reflect the admission date at which the report should end.

ENDING DATE

This prompt is associated with specification of a date range for which the Ad Hoc Request Response Statistics Report should be run. At this prompt, you should enter the ending date for which you wish the report to run.

ENTER NEW DATE

This prompt appears in the Pull List Date Change option of the Pull List Functions Menu asking for the new date which records on pull list are needed. You may enter a new date for which records are requested (must be in the future).

ENTER NEW PULL LIST NAME

This prompt appears in the Create a Pull List option of the Pull List Functions Menu. You may enter the name of pull list you are creating (may be 3-50 characters in length).

ENTER RESPONSE

This prompt appears in the Retrieval Rate Statistics option of the Management Reports Menu asking you to enter the method with which you wish to run the report. You may enter:

```
.1 to run for a date range
.2 to run for one day
.3 to run for one pull list
```

ENTER THE LIST (HIGHEST) VOLUME TO CREATE, #{N}//

This prompt appears in the Multiple New Volume Creation option of the Transaction Menu. The system will display a default sufficient to allow creation of one additional volume. You may create up to six additional volumes at a time. You may enter:

```
.<RET> to accept the default
.a number to indicate the highest volume you wish to create
```

FILL WHICH REQUEST

This prompt appears in the Fill a Request option of the Request Records Menu. You will be returned to it repeatedly during a session so that you may create a list of requests to be processed at the conclusion of the session. This is a versatile step within the option allowing various actions depending upon whether a list has yet been established. Note that the actions depend upon whether a list has yet been established, not whether requests have previously been entered during the session. The system must first accept these requests as valid prior to entering them on a list. Requests which have been cancelled, filled or are for inactive/deleted records will not be accepted by the system and not placed on the list. The actions surrounding the entry of <RET> or up-arrow <^> will vary depending upon what point you are at in the session. At any point during the session you may enter the following at this prompt:

```
.patient name
.request number you wish to fill
.wand request label (if record is active and request has not yet been
filled)
```

The following actions are also possible:

> Requests may be deleted from an established list by entering a minus sign <-> followed by the number of the request you wish to delete. You may first enter a <?> to get the number of the request you wish to delete.

> If a <RET> or up-arrow <^> are entered prior to a list being established, processing will be aborted.

> If a <RET> is entered after a list has been established, the requests will be filled (or queued for filling) and the session will end.

> If an up-arrow <^> is entered after a list has been established, you will be given the opportunity to abort processing (you will be prompted "Do you still want to 'fill' selected requests? No//").

FROM DATE
This prompt appears in the Retrieval Rate Statistics option of the Management Reports Menu asking for the beginning date of the date range for which you wish to run the report.

HOME LOCATION {CURRENT FILE ROOM}//
This prompt appears in the Create a Label/Record/Volume, Update Record's Attributes, and New Volume Creation options of the Transaction Menu. At this prompt, you are asked for the home location of the record selected (where it will reside when not charged out). You may enter:

```
.<RET> to accept the default
.another home location (must be a file room defined to store this record
type)
.up-arrow <^> to abort processing - If an up-arrow <^> is entered, the
default will be assumed at this prompt as well as the next prompt "Current
Borrower/File Room".
```

HOW DO YOU WANT LIST SORTED? TERMINAL DIGITS//
This prompt appears in the Print Pull List(s) option of the Pull List Functions Menu. You are prompted for the method you wish the pull list to be sorted. You may enter:

```
.<RET> to accept default
.C to sort by clinic name, then terminal digit
.A to sort by clinic name, then appointment time
```

HOW DO YOU WANT THE '{APPLICATION}' RECORDS SORTED? Mixed//
This prompt appears in the Trace Movement History option of the Record Information Menu. You may enter:

```
.<RET> to accept default
.'S'EPARATE to sort record type and volumes separately
```

HOW DO YOU WANT THE LISTING SORTED? Borrower//
This prompt appears in the Charged Records By Home Location and Overdue Records List options of the Management Reports Menu. You may enter:

```
.<RET> or 'B'ORROWER
.'N'AME to sort by patient name
.'T'ERMINAL DIGIT
```

INCLUDE RECORDS CURRENTLY CHECKED INTO THE HOME LOCATION? No//
YES/NO   This prompt appears in the Charged Records By Home Location option of the Management Reports Menu. If you choose to include those records currently checked into the home location (all records belonging to the specified home location will appear on the printout), you may wish to consider running this list during off-hours since it may be quite lengthy. Enter <RET> or NO to include only those records currently charged out of the home location.

INDICATE WHAT INFORMATION TO DISPLAY: All//
This prompt appears in the Record Inquiry option of the Record Information Menu. You may enter:

```
.<RET> or 'A'LL to display record information for all of the selected
patient's records
.'T'YPE - you will subsequently be prompted to specify a record type
.'V'OLUME - you will subsequently be prompted for the volume
```

INSTITUTION PROMPTS (of REQUESTOR, FILE ROOM, BORROWER, ETC.)
On occasion, you may be prompted for an institution in an option in which you would not normally expect to be. This generally occurs when there is a conflict between the user's institution (as defined in your site's INSTITUTION file) and the associated institution of the entry just made. The system will accept an entry at such a prompt and processing will continue; however, appearance of such a prompt may signify a potential problem and your site manager should be consulted.

ISSUE REQUEST FOR RECORDS? YES//
This prompt appears in the Admitting Area Chart Request option of the MAS Specific Set-up Menu. It also appears when registering a patient through the ADT (Admission-Discharge-Transfer) module. You may enter:

```
.<RET> or YES if you wish to request the records from the file room - a
request notice will print on the specified printer for the appropriate file
room
.NO
```

LOOSE FILING INDICATOR
This prompt appears in the Update Record's Attributes option of the Transaction Menu and is used to notify file room personnel that loose filing exists for a record being checked into the file room. If YES is entered at this prompt, a message will be displayed when the record is checked into the file room advising of the loose filing. Necessary filing may then be accomplished prior to placing the patient's record back on the shelf. To turn this message off, this field must be set back to NO. You may enter:

```
.YES
.NO
.<RET> - NO will be assumed
```

OK? YES//
This prompt appears often in Record Tracking and relates to your entry to the previous prompt. Essentially, the system is asking "Is this the selection you wish to make?". If the entry displayed is incorrect, it is advisable that an up-arrow <^> be entered rather than NO. Entry of NO will eventually return you to the previous prompt; however, the route by which it returns may be somewhat confusing. You may enter a <?> for a list of possible selections and make the correct entry. You may enter:

```
.<RET> if correct
.up-arrow <^> to return to the previous prompt
```

PRINT OVERDUE LIST FOR AN INSTITUTION OR HOME LOCATION? Institution//
This prompt appears in the Overdue Records List option of the Management Reports Menu. You are being prompted whether you wish to run the report for an entire institution (division) defined at your facility or a specific home location (file room). If run for one of your institutions, all home locations for that institution will be included on the report. You may enter:

```
.<RET> to accept default institution
.'H'OME LOCATION - you will subsequently be prompted for the home location
```

PULL LIST: {PULL LIST NAME}//
This prompt appears in the Create a Pull List option of the Pull List Functions Menu with the default being the name you entered at the beginning of the session. At this prompt, you are given the opportunity to edit or change the name of the pull list you are creating. You may enter:

```
.<RET> if the name is correct
.a new name (3-50 characters)
.up-arrow <^> to abort processing; pull list will be deleted
```

PULL LIST NUMBER: {N}//
This prompt appears in the Create a Pull List option of the Pull List Functions Menu. It will appear with a default assigned by the system. This default will be the next consecutive number from the last entry made. If the last entry was out of sequence, the default will be consecutive to that entry. You may change the pull list number at this prompt if you wish. The system will not accept a number already used. You may enter:

```
.<RET> to accept the default
.another number (between 1 and 9999999)
```

REASON NOT TO RETIRE
This prompt appears in the Update Record's Attributes option of the Transaction Menu and is used to change the retirement status of a record. There are three possible retirement statuses as listed below. A record's retirement status is shown on its record inquiry which should always be checked prior to retiring a record. All records are assumed OK TO RETIRE unless otherwise specified through this field. At this prompt, you may enter:

```
.<RET> to accept default (if there is one); if blank, the system will
assume a retirement status of OK TO RETIRE
.'T'EACHING to indicate record is used for teaching and should not be
retired
.'R' for TUMOR REGISTRY to indicate record is in the TUMOR REGISTRY and
should not be retired
.'O'K TO RETIRE
.up-arrow <^>; present status will be assumed
```

REASON RECORD WAS MISSING
This prompt appears in the Flag a Record As Missing option of the Transaction Menu when removing a missing flag from a record. It may also appear in several other options when a missing record is selected for transaction and the user is prompted through the process of removing the missing flag. Your possible entries at this prompt are dependent upon the reasons established for use at your site. A <?> may be entered at this prompt and a list of acceptable reasons will be displayed from which you may select. Possible entries are:

```
.reason record was missing (from list)
.<RET> to leave blank
```

RECORD TYPE RESTRICTION

This prompt appears in the Create a Pull List option of the Pull List Functions Menu and may be used to designate a specific record type which should be requested for each patient subsequently entered; for example, you may wish to request only the latest volume of each patient's medical record. If this is the case, an entry in this field will streamline the session by eliminating the display of each patient's Short Record Inquiry and prompting for a selection upon entry of the patient's name. If you will be requesting a variety of record types and volumes, make no entry in this field. You may enter:

```
.record type you wish to request on pull list (must be associated with your
application)
.<?> for a list of possible record types
.<RET> to leave blank
.up-arrow <^> to abort processing; pull list will be deleted
```

REQUESTING RECORD FOR WHICH BORROWER

This prompt appears in the Request a Record option of the Request Records Menu. The name of the borrower to which the record is to be charged should be entered at this prompt. The borrower must be active in your BORROWERS/FILE AREAS file. You may enter:

```
.name of borrower
.wand borrower's bar code label
```

REQUESTOR: {Name}

This prompt appears in the Edit a Request option of the Request Records Menu with a default of the previously entered requestor. At this prompt, you may change the requestor of the record. The requestor in this case is the same as the borrower to whom the record is to be charged. The requestor entered must be active in your BORROWERS/FILE AREAS file. You may enter:

```
.name of new requestor
.<RET> or up-arrow <^>; default will be accepted
```

SELECT ADMITTING AREA

This prompt appears in the Admitting Area Chart Request option of the MAS Specific Menu when there is more than one admitting area defined in your site parameters. You are prompted for the name of the admitting area requesting the records. You may enter:

```
.name of admitting area requesting record
.<?> for a list from which to select
```

SELECT BORROWER

This prompt appears in a number of options in Record Tracking. It relates to the individual or location to which records are or will be charged. Your entry must be an active borrower in your BORROWERS/FILE AREAS file. You may enter:

```
.name of borrower
.<?> for a list from which to select
.wand borrower's barcode label
```

SELECT DATE

This prompt appears in the Charge Out Pull List Records and Print Pull List(s) options of the Pull List Functions Menu. At this prompt, you should enter the date for which records on the pull list(s) being charged out or printed are requested.

SELECT HOLDING AREA

This prompt appears in the Charge Out Pull List Records option of the Pull List Functions Menu and is used when pull list records are being sent to a holding area prior to their going to the clinic or borrower for which they are requested. Your entry must be an active borrower in the BORROWERS/FILE AREAS file. You may enter:

```
.name of holding area
.<?> for a list from which to select
```

SELECT HOME LOCATION

This prompt appears in the Charged Records By Home Location and Overdue Records List options of the Management Reports Menu and is used to specify the home location for which you wish these reports to be run. You may enter:

```
.name of home location
.<?> for a list from which to select
```

SELECT INSTITUTION: {INSTITUTION}//

This prompt appears in the Overdue Records List option of the Management Reports Menu prompting you for the institution for which you wish to run the report. In this case, the term institution is synonymous with division. The prompt will only appear if more than one institution is defined at your site, and it will appear with a default which will be the institution associated with the user of the option. You may enter:

```
.<RET> to accept the default
.name of the institution for which you wish to run the report
```

SELECT LABEL DEVICE

Generally your site parameters will specify default label devices by label type for each file room and admitting area defined within your Record Tracking application. When it is necessary for a label to print, it will automatically print on the specified label device and this prompt will not appear. When no label device has been defined, this prompt will appear. Also, certain users have the ability to sign into Record Tracking and select the file room from which they wish to track records. Most users have access to one file room only. They are also prompted whether they wish to use that file room's default devices. If NO is answered, this prompt will appear whenever it is necessary for a label to print. If you are not one of these users and this prompt appears, it is recommended your application coordinator or site manager be notified to assure devices are defined in your site parameters.

This prompt may appear with a default. You may enter:

```
.<RET> to accept default
.device name/number as defined in your parameters on which to print
.<?> for a list of devices from which to select
```

SELECT LABELS FROM LIST

This prompt appears in the Create a Label/Record/Volume option of the Transaction Menu. It will appear in conjunction with display of the selected patient's short record inquiry prompting you to select the record for which you wish to print a label. You may enter:

```
.number of record from display for which you wish to print a bar code label
.a range of numbers; i.e. 1-4
.a combination of numbers separated by commas; i.e.  1,3,5
.a combination of numbers separated by commas and a range; i.e. 1,3 -5
.<RET> or up-arrow <^> if you wish to create a new record or volum e rather
than print a bar code label
```

SELECT MISSING RECORD

This prompt appears in the Flag a Record As Missing option of the Transaction Menu asking you to specify the record you wish to flag as missing, remove missing flag from or approve/disapprove the finding of. You may enter:

```
.wand the bar code label of the record
.the Record Tracking identifier number
.patient name
```

SELECT MOVEMENT TYPE

This prompt appears in the Inactive/Re-Activate Records and Transfer Records options of the Transaction Menu asking you to specify the action you wish to take. You may enter:

```
.movement type you wish to make.  Depending upon the option in which you
are working, they may be:

  .'I'NACTIVATE
  .'R'EACTIVATE
  .TRANSFER BACK FROM OTHER VAMC
  .TRANSFER TO OTHER VAMC

.<?> for a list of selectable movement types
```

SELECT NEW RECORD TYPE

This prompt appears in the Create a Label/Record/Volume option of the Transaction Menu asking you to specify the record type for which you wish to create a new or additional volume (i.e., master folder, medical record, administrative record, etc.). The possible selections will vary between sites and applications. You may enter:

```
.record type for which you wish to create a new or additional volume (must
be defined in your parameters)
.<?> to view a list of possible selections
.<RET> to return to the "Select PATIENT" prompt
```

SELECT PATIENT

This prompt appears in a number of options throughout Record Tracking asking you to enter the name of the patient whose records you wish to process or for whom you wish to view record information. The patient entered must already be in your database (PATIENT file) and in some cases must already have records in the Record Tracking system. Please refer to the appropriate option documentation, if needed, to ascertain whether the patient must have records in Record Tracking in order to be accepted.

SELECT PATIENT NAME

This prompt appears in the Patient Charge Out option of the Transaction Menu asking you to enter the name of the patient who is borrowing their own record. The patient must already be in your database. If they have no records in Record Tracking, the system will create them in accordance with your site parameters when the patient's name is entered at this prompt.

SELECT PULL LIST

This prompt appears throughout the Pull List Functions Menu asking you for the pull list with which you wish to work. In Charge Out Pull List Records and Print Pull List(s), it will appear with a default of ALL CLINIC LISTS. It also appears in the Retrieval Rate Statistics option of the Management Reports Menu asking for the pull list for which to run the report. You may enter:

```
.pull list name
.pull list number
.date records are needed on pull list (a selection will be displayed)
.<RET> if there is a default, it will be accepted; otherwise, processing
will be aborted
```

It should be noted that if you are using the Print Pull List(s) option and wish to sort your pull list by other than terminal digits, a <RET> must be entered at this prompt (accepting the default of ALL) in order to subsequently be prompted for the method to sort the list; 'C'LINIC, 'A' to sort by clinic name then appointment time.

SELECT RECORD

This prompt appears in a number of Record Tracking options and is used to enter records for processing. The possible actions surrounding this prompt vary somewhat depending upon the option in which you are working. The action surrounding the entry of <RET> and up-arrow <^> also varies depending upon the option. In all cases, the following entries may be made whenever this prompt is displayed:

```
.Record Tracking identifier number
.wand record barcode label
.patient name - patient's short record inquiry will subsequently be
displayed from which you may select the appropriate record
```

The following options return you to this prompt repeatedly thereby allowing creation of a list of records which will be processed (or queued for processing) upon conclusion of the session: Charge Out Records, Check In Records, Inactivate/Reactivate Records, Re-Charge Records and Transfer Records of the Transaction Menu; Request a Record, Request Records Menu; and Create a Pull List and Add Records To Pull List of the Pull List Functions Menu. The following entries apply to these options:

```
.If records have already been entered for processing during the session,
they may be deleted from the list by entering a minus sign (-) plus the
Record Tracking identifier number; i.e., -28.  If you do not know the
Record Tracking identifier number, you may first enter a <?> at this prompt
and it will be displayed.
.<RET> to signify the end of the session; records will be processed or
queued for processing
```

The following options utilize this prompt for entering records for processing but do not return to it repeatedly allowing the creation of a list: Update Record's Attributes and Delete a Record of the Transaction Menu and Request a Record of the Request Records Menu. You may enter a record for processing as described above.

SELECT {PATIENT NAME}'S RECORDS FROM LIST

This prompt appears throughout Record Tracking in conjunction with display of the patient's short record inquiry. You may select from the short record inquiry those of the patient's records you wish to process. You may enter:

```
.number(s) of records to be processed; you may enter a single number,
several single numbers separated by commas, a range of numbers separated by
a dash or a combination; i.e. 1,3,4 or 1-3, or 1-3,5,7
```

SELECT RECORD TRACKING APPLICATION

This prompt will appear for those users who have access to more than one Record Tracking application; i.e. site managers, application coordinators, etc. Most users have access to only one. At this prompt, you should enter the Record Tracking application in which you wish to work; MAS or Radiology.

SELECT RECORD TRACKING FILE ROOM

This prompt will appear for those users who have access to more than one Record Tracking file room; i.e. site managers, application coordinators, supervisors, managers. At this prompt, you should enter the name of the file room from which you wish to track records. This prompt may appear with a default. You may enter:

```
.<RET> to accept the default
.name of file room (as it appears in your parameters) from which you wish
to track records
```

SELECT RECORD TYPE

This prompt appears in the Multiple New Volume Creation and New Volume Creation options of the Transaction Menu as well as the Record Inquiry option on the Record Information Menu and is used to specify the record type with which you wish to work; i.e. medical record, chest films, etc. Record types will vary between sites and applications. A question mark may be entered for a list from which to select.

SELECT REQUEST

This prompt appears in a number of Request Records and Pull List Functions Menu options and is used to designate the request with which you wish to work. You may enter the following at this prompt:

```
.request number
.wand request label
.patient name - patient's request profile will subsequently be displayed
from which you may select the appropriate request
```

SELECT TYPE OF LIST? ALL//

This prompt appears in the Print Pull List(s) option of the Pull List Functions Menu and is used to designate the information you wish to include on the pull list(s) being printed. You may enter:

```
.<RET> to accept default; ALL requests will be printed
.'N'ON-FILLABLE; only requests which have been designated NON-FILLABLE will
be printed
.'D'ETAILED NON-FILLABLE; all NON-FILLABLE requests will be printed along
with the Combination Data Trace Report of the record which traces past
record locations as well as future clinic appointments.  (This report may
also be obtained through the Combination Data Trace option of the Record
Information Menu.)
```

SUPERVISOR COMMENTS
This prompt appears in the Flag a Record As Missing option of the Transaction Menu. It is a word processing field in which comments pertaining to the missing record may be entered. You may enter:

```
.comment pertaining to missing record
.<RET> to leave blank
```

TEMPORARY COMMENT:
This prompt appears in the Patient Charge-Out option of the Transaction Menu allowing you to enter a free text (2-75 characters) comment pertaining to the charge-out. This comment will appear on the patient's short record inquiry until such time as the system records the record as being returned. This comment is optional and may be left blank by entering a <RET>.

TO DATE:
This prompt appears in the Retrieval Rate Statistics option of the Management Reports Menu asking for an ending date in the date range for which you wish to run the report.

TRACE CUT-OFF DATE: T-l00//
This prompt appears in the Combination Data Trace option of the Record Information Menu and is used to specify how many days in the past you wish the report to compile record activities. Assuming the information has not been purged, you may track back as far as 999 days. You may enter:

```
.<RET> to accept default; report will reflect the past 100 days of activity
.another cut-off date (must be a past date)
```

TRANSFER INSTITUTION
This prompt appears in the Transfer Records option of the Transaction Menu and is used to designate the facility to which you are transferring records. You may enter:

```
.name or number of institution to which you are transferring records (must
be in your INSTITUTION file)
.<?> for display of your INSTITUTION file from which you may select
```

TRANSFER REQUESTS TO VOLUME 'N'? NO//
YES/NO   This is the final prompt in the Move Requests To Last Volume option of the Transaction Menu confirming whether you wish to transfer record requests to the volume entered.

UPDATE BORROWER INFORMATION
PHONE#
LOCATION/ROOM

Depending upon site parameters, this prompt may appear following selection of a borrower in a number of Record Tracking options. It is used to update the phone# and location of the selected borrower as it appears in the BORROWERS/FILE AREAS file. If the information is already in the file, these fields will appear with defaults and you may enter a <RET> to accept the defaults. You may also edit the current information.

VOLUMES REQUESTED: LATEST VOLUME//

This prompt appears in the Create a Pull List option of the Pull List Functions Menu and is used to specify what volumes you will be requesting on the pull list. You may enter:

```
.<RET> to accept default (only the latest volume of the record type
specified will be requested on the pull list)
.'A'LL VOLUMES
.up-arrow <^> to abort processing; pull list will be deleted
```

WHERE WAS THE RECORD FOUND

This prompt appears in the Flag a Record As Missing option of the Transaction Menu when removing a missing flag or when removing a missing flag from a record through another option. You may enter:

```
.name of borrower/file area where record was found (must be in
BORROWERS/FILE AREAS file)
.<RET> or up-arrow <^> to abort processing; missing flag will not be
removed
```

WOULD YOU LIKE TO PRINT A BARCODE LABEL? No//

This prompt appears in the Charge-Out Records and Check-In Records options of the Transaction Menu when a single record is selected from a patient's short record inquiry, rather than by wanding the bar code label or entering the record identifier number. This gives you the opportunity to print a barcode label, if the record does not already have one. Note that it will only appear when a single record is selected from a patient's short record inquiry (not multiple records). You may enter:

```
.<RET> or NO
.YES; barcode label will be printed on the appropriate default device or,
if not defined in your site parameters, you will be prompted for a device
on which to print
```